



Sage Oak Charter Schools

Regular Meeting of the Board of Directors

Published on June 6, 2025 at 1:36 PM PDT

Amended on June 11, 2025 at 3:26 PM PDT

Date and Time

Thursday June 12, 2025 at 9:00 AM PDT

Location

Sage Oak Charter Schools

1473 Ford Street, Suite #105

Redlands, CA 92373

Regus- Gateway Chula Vista

333 H Street, Suite 5000

Chula Vista, CA 91910

[Join Zoom Meeting](#)

ID: 91736013228

Passcode: 679101

[\(US\) +1 301-715-8592](#)

Passcode: 679101

MISSION STATEMENT

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY

The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Sage Oak Charter Schools.

Agenda

	Purpose	Presenter	Time
I. Opening Items			9:00 AM
A. Call the Meeting to Order		Board President	1 m
B. Record Attendance		Board President	1 m
Roll Call:			
William Hall, President			
Michael Humphrey, Vice President			
Steve Fraire, Clerk			
Susan Houle, Member			
Peter Matz, Member			
II. Pledge of Allegiance			9:02 AM
A. Led by Board President or designee		Board President	1 m
III. Approve/Adopt Agenda			9:03 AM
A. (Action) Approval of Agenda for June 12, 2025 Regular Meeting of the Board of Directors	Vote	Board President	1 m
It is recommended the Board approve the agenda for the June 12, 2025, Regular Meeting of the Board of Directors as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).			

	Purpose	Presenter	Time
--	---------	-----------	------

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

IV. Approve Minutes

9:04 AM

- | | | | | |
|-----------|--|-----------------|-----------------|-----|
| A. | (Action) Approval of Minutes for May 8, 2025 Regular Meeting of the Board of Directors | Approve Minutes | Board President | 1 m |
|-----------|--|-----------------|-----------------|-----|

It is recommended the Board approve the minutes from the May 8, 2025, Regular Meeting of the Board of Directors, as presented, for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

V. Public Comment - Closed Session

The public has a right to comment on any items of the Closed Session agenda. Members of the public will be permitted to comment on any other item within the Board's jurisdiction under the section Public Comments/Recognition/Reports.

VI. Adjourn to Closed Session

9:05 AM

- | | | | | |
|-----------|--|------|-----------------|-----|
| A. | The Board Will Consider and May Act on Any of the Closed Session Matters | Vote | Board President | 1 m |
|-----------|--|------|-----------------|-----|

Roll Call Vote:

William Hall

	Purpose	Presenter	Time
Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			
VII. Closed Session			9:06 AM
A. Closed Session Agenda			10 m
1. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION (Gov. Code Section 54956.9(d)(2).) <i>CDE No. S-0902-24/25</i>			
2. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION (Gov. Code Section 54956.9(d)(2)) <i>[One matter]</i>			
3. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION (Gov. Code Section 54956.9(d)(1).) <i>OAH Case No. 2025040083</i>			
VIII. Reconvene Regular Meeting			9:16 AM
A. Report Out Any Action Taken in Closed Session		Board President	1 m
IX. Public Comments/Recognition/Reports			
Please submit a Request to Speak to the Board of Directors using the chat feature on the right-hand side of the Zoom platform. Please state the agenda item number that you wish to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20) minutes on the same subject. This portion of the agenda is for comments, recognitions, and reports to the Board and is not intended to be a question-and-answer period. If you have questions for the Board, please provide the Board President with a written statement, and an administrator will provide answers at a later date.			
X. Correspondence/Proposals/Reports			9:17 AM
A. 2024-2025 School Year in Review		Krista Woodgrift	8 m
B. Sage Oak Charter Schools Leadership Honorees Brenda Ramirez, ASB & Student Success Support		Krista Woodgrift	5 m

	Purpose	Presenter	Time
	Candice Coffey, Assistant Superintendent of Human Resources		
C.	CliftonLarsonAllen LLP (CLA) Governance Entrance Letter	Tim O'Brien	1 m

XI. Consent Agenda**9:31 AM**

Items listed under the Consent Agenda are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Agenda upon the request of any member of the Board, discussed, and acted upon separately.

The items below form our Consent Agenda. The last item in this section is a single vote to approve them en masse.

A. Consent - Business Services 1 m

1. Check Register - May 2025
2. Report of Investment Activity - April 2025
3. Ratification of Victorville Chevrolet Cadillac Sale Contracts
4. Ratification of School Pathways Quote Form with Sage Oak Charter Schools (Renewal)
5. Ratification of School Pathways Quote Form, SOW #19581
6. Ratification of School Pathways Quote Form, SOW #20274
7. Ratification of Total Technology Quote No. D22238
8. Ratification of City of Redlands Park Reservation QPR-2364
9. Ratification of Tech & Mortar, LLC Statement of Work (Renewal)
10. Ratification of Hyatt Place Riverside/Downtown Group Sales Agreement
11. Ratification of School Services of California, Inc. Contract (Renewal)
12. Ratification of KnowBe4 Quote #Q-1281734 (Renewal)
13. Ratification of Pepper & Olive Letter of Agreement
14. Ratification of BEC Industrial Estimate #SAGEOA-050925
15. Ratification of Fullerton Parks & Recreation Permit #16377
16. Ratification of Opichi LLC Agreement
17. Ratification of Newfront Property & Casualty Insurance Policy Renewals
18. Ratification of Tech to School Buyback Quote
19. Ratification of Courtyard by Marriott Event Sales Agreement
20. Ratification of Raymond Intralogistics Solutions West Proposal

B. Consent - Education Services 1 m

	Purpose	Presenter	Time
	<ol style="list-style-type: none"> 1. Approval of Sage Oak Charter Schools Parent and Student Handbook 2. Approval of 2025-2026 Sage Oak Charter Schools Title 1 School-Parent/Guardian Compact 3. Approval of 2025-2026 Sacramento One-Day Field Trip, Grades 8-12 4. Approval of 2025-2026 Boston/Philadelphia Overnight Field Trip, Grades 9-12 5. Ratification of Instructure, Inc. Order Form, Canvas (Renewal) 6. Ratification of Instructure, Inc. Order Form, Mastery Connect (Renewal) 7. Ratification of Renaissance Learning, Inc., Quotes #Q-187725 & #Q-197048 (Renewal) 		
C.	Consent - Human Resources		1 m
	<ol style="list-style-type: none"> 1. Approval of Certificated Personnel Report 2. Approval of Classified Personnel Report 3. Approval of Job Descriptions 4. Approval of 2025-2026 Sage Oak Charter Schools Employee Handbook Revisions 5. Approval of Sage Oak Charter Schools Comprehensive School Safety Plan (CSSP) Revisions 6. Approval of 2025-2026 11-Month Certificated Employee Work Year Calendars 		
D.	Consent - Policy Development		1 m
	<ol style="list-style-type: none"> 1. Approval of Changes to Existing Board Policies Revised/Reviewed/Rescinded 		
	1000 Series- Community Relations		
	1020-SO Field Trip Policy		
	1025-SO Uniform Complaint Policy		
	1035-SO Access to Public Records Policy		
	3000 Series- Business/Non-Instructional		
	3010-SO Fiscal Control Policy and Procedures		
	3015-SO Investment Policy		
	3150-SO Authorization to Hire Policy (<i>Rescinded</i>)		
	5000 Series- Student Services		
	5065-SO Enrollment Policy		
	5090-SO Harassment, Intimidation, Discrimination, and Bullying Policy		
	5120-SO Transitional Kindergarten/Kindergarten Enrollment Policy (<i>Rescinded</i>)		

	Purpose	Presenter	Time
6000 Series- Instruction			
6005-SO Parent and Family Engagement Policy			
6010-SO Independent Study Policy			
6015-SO Comprehensive Sexual Health Education Policy			
6025-SO Section 504 Policy			
6030-SO Education for Foster and Mobile Youth Policy			
6035-SO Mathematics Placement Policy			
6040-SO Assessment Policy			
6075-SO Special Education Certificate of Completion			
6095-SO Repeated Courses Policy			
6115-SO Attendance, Support, and Involuntary Disenrollment Policy			
6120-SO Meeting Policy			
6125-SO Report Card Policy			
6150-SO Intervention Policy			
E.	(Action) Approval of Consent Agenda	Vote	Board President
			1 m

Items listed under the Consent Agenda are considered routine and will be approved/adopted by a single motion.

It is recommended the Board approve the Consent Agenda as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XII. Business Services

9:36 AM

A.	(Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2024-2025 Annual Reports for Sage Oak Charter Schools	Vote	Tim O'Brien	1 m
-----------	--	------	-------------	-----

It is recommended the Board approve the Proposition 28 Arts and Music in Schools Funding, 2024-2025 Annual Reports as presented for Sage Oak Charter School

	Purpose	Presenter	Time
	(#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).		
	Fiscal Impact: None		
	Roll Call Vote: William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____		
B.	(Action) Approval of Expenditure Plan for the Arts, Music, & Instructional Materials Block Grant (AMIM)	Vote Tim O'Brien	2 m
	It is recommended the Board approve the expenditure plan for the Arts, Music, & Instructional Materials Block Grant (AMIM) as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).		
	Fiscal Impact: \$2,429,837		
	Sage Oak Charter School (#1885)	\$1,985,531	
	Sage Oak Charter School - Keppel (#1886)	\$181,510	
	Sage Oak Charter School - South (#2051)	\$262,796	
	Roll Call Vote: William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____		
C.	(Action) Approval of Sage Intacct Multi-Year Proposal (Renewal)	Vote Tim O'Brien	1 m
	It is recommended the Board approve the proposal for the Sage Intacct Financial Management 3-year subscription renewal for the term 7/1/25-6/30/28, as presented		

	Purpose	Presenter	Time
	for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).		
	Fiscal Impact: \$67,150 Sage Oak Charter School (#1885) \$53,223 Sage Oak Charter School - Keppel (#1886) \$6,003 Sage Oak Charter School - South (#2051) \$7,924		
	Roll Call Vote: William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____		
D.	(Action) Approval of 2025–2026 Consolidated Application and Reporting System (CARS)	Vote Tim O'Brien	1 m
	It is recommended the Board approve the 2025-2026 data collections for submission to the Consolidated Application and Reporting System (CARS) as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).		
	Roll Call Vote: William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____		
E.	(Action) Approval of Settlement Agreement (Lares v. The Collaborative Charter Services Organization, et al.)	Vote Krista Woodgrift	1 m
	It is recommended the Board approve the settlement agreement (Lares v. The Collaborative Charter Services Organization, et al.) for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).		

	Purpose	Presenter	Time
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Peter Matz			
Moved by _____	Seconded by _____	Ayes _____ Nays _____ Absent _____	

XIII. Human Resources **9:42 AM**

- | | | | |
|--|------|----------------|-----|
| A. (Action) Approval of 2025-2026 Certificated Educator Salary Schedule Revisions | Vote | Candice Coffey | 1 m |
|--|------|----------------|-----|

It is recommended the Board approve the revisions to the 2025–2026 Certificated Educator Salary Schedule, expanding eligibility for the advanced degree stipend as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XIV. Operations and Accountability **9:43 AM**

- | | | | |
|---|------|---------------|-----|
| A. (Action) Approval of 2025-2026 Sage Oak Charter Schools English Learner (EL) Master Plan, Presented by Lorinda Loughlin, Assessment Coordinator | Vote | Lisa Thompson | 5 m |
|---|------|---------------|-----|

It is recommended the Board approve the 2025-2026 English Learner (EL) Master Plan as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

	Purpose	Presenter	Time
Susan Houle			
Peter Matz			
Moved by _____	Seconded by _____	Ayes _____	Nays _____ Absent _____

XV. Policy Development

9:48 AM

- | | | | | |
|-----------|---|------|-------------|-----|
| A. | (Action) Approval of New 3155-SO Scholarship Program Policy | Vote | Tim O'Brien | 4 m |
|-----------|---|------|-------------|-----|

It is recommended the Board approve the 3155-SO Scholarship Program Policy as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XVI. Public Hearing

9:52 AM

- | | | | | |
|-----------|--|---------|---------------|------|
| A. | (Hearing) 2025-2026 Local Control and Accountability Plans (LCAP) and Local Performance Indicator Self-Reflection Reports, Presented by Jodi Cope, Director of Operations & Accountability | Discuss | Lisa Thompson | 12 m |
|-----------|--|---------|---------------|------|

Education Code Section 47606.5 states that the Governing Board of a charter school shall hold a public hearing as part of the process to adopt the 2025-2026 Local Control and Accountability Plans (LCAP) for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051). The 2025-2026 LCAPs and Local Performance Indicator Self-Reflection reports for the California School Dashboard will be presented during the hearing.

1. 2025-2026 LCAP Plan Summary - Sage Oak Charter School (#1885)
2. 2025-2026 LCAP Plan Summary - Sage Oak Charter School - Keppel (#1886)
3. 2025-2026 LCAP Plan Summary - Sage Oak Charter School - South (#2051)

Hearing Open: _____

	Purpose	Presenter	Time
Hearing Closed: _____			
<p><i>The proposed 2025-2026 Local Control Accountability Plans (LCAP) for Sage Oak Charter Schools are available for review on the Sage Oak Charter Schools website. The 2025-2026 Local Control Accountability Plans (LCAP) vote for adoption will occur at the Regular Board of Directors Meeting on June 18, 2025.</i></p>			
B.	(Hearing) 2025-2026 Proposed July Budget - Sage Oak Charter Schools	Discuss Tim O'Brien	12 m

It is recommended the Governing Board of a charter school hold a public hearing as part of the process to adopt the 2025-2026 Proposed July Budget for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

1. 2025-2026 Proposed July Budget - Sage Oak Charter Schools
2. Education Protection Account (EPA) - Sage Oak Charter School (#1885)
3. Education Protection Account (EPA) - Sage Oak Charter School - Keppel (#1886)
4. Education Protection Account (EPA) - Sage Oak Charter School - South (#2051)

Hearing Open: _____

Hearing Closed: _____

The 2025-2026 Proposed July Budget is available for review on the [Sage Oak Charter Schools website](#). The 2025-2026 Proposed July Budget vote for adoption will occur at the Regular Board of Directors meeting on June 18, 2025.

XVII. Calendar

The next scheduled meeting will be a Regular Board of Directors Meeting held on June 18, 2025.

XVIII. Comments

10:16 AM

- | | | |
|-----------|-------------------------|-----|
| A. | Board Comments | 3 m |
| B. | Superintendent Comments | 4 m |

	Purpose	Presenter	Time
XIX. Closing Items			10:23 AM
A. Adjourn Meeting	Vote	Board President	1 m
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Peter Matz			
Moved by _____	Seconded by _____	Ayes _____	Nays _____ Absent _____

FOR MORE INFORMATION
For more information concerning this agenda, contact
Sage Oak Charter Schools.

Coversheet

(Action) Approval of Minutes for May 8, 2025 Regular Meeting of the Board of Directors

Section:	IV. Approve Minutes
Item:	A. (Action) Approval of Minutes for May 8, 2025 Regular Meeting of the
Board of Directors	
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Meeting of the Board of Directors on May 8, 2025

APPROVED

SAGE OAK
CHARTER SCHOOLS



Sage Oak Charter Schools

Minutes

Regular Meeting of the Board of Directors

Date and Time

Thursday May 8, 2025 at 9:00 AM

Location

Sage Oak Charter Schools

1473 Ford Street, Suite #105

Redlands, CA 92373

Regus- Gateway Chula Vista

333 H Street, Suite 5000

Chula Vista, CA 91910

[Join Zoom Meeting](#)

ID: 98391827372

Passcode: 038594

[\(US\) +1 646-931-3860](#)

Passcode: 038594

MISSION STATEMENT

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY

The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Sage Oak Charter Schools.

Directors Present

M. Humphrey, P. Matz, S. Fraire, S. Houle, W. Hall

Directors Absent

None

Guests Present

B. Bookser, C. Anema, E. Bunch, E. Horta, K. Woodgrift, L. Snee

I. Opening Items

A. Call the Meeting to Order

W. Hall called a meeting of the board of directors of Sage Oak Charter Schools to order on Thursday May 8, 2025 at 9:00 AM.

B. Record Attendance

II. Pledge of Allegiance

A. Led by Board President or designee

W. Hall, Board President, led the meeting in the Pledge of Allegiance.

III. Approve/Adopt Agenda

A. (Action) Approval of Agenda for May 8, 2025 Regular Meeting of the Board of Directors

M. Humphrey made a motion to W. Hall, Board President, to approve the agenda as presented for the May 8, 2025, Regular Meeting of the Board of Directors.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Approve Minutes

A. (Action) Approval of Minutes for March 13, 2025 Regular Meeting of the Board of Directors

P. Matz made a motion to W. Hall, Board President, to approve the minutes as presented from the Regular Meeting of the Board of Directors on 03-13-25.

M. Humphrey seconded the motion.

The board **VOTED** unanimously to approve the motion.

B. (Action) Approval of Minutes for March 28, 2025 Special Meeting of the Board of Directors

S. Houle made a motion to W. Hall, Board President, to approve the minutes as presented from the Special Meeting of the Board of Directors on 03-28-25.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

C. (Action) Approval of Minutes for April 10, 2025 Board of Directors Study Session

P. Matz made a motion to W. Hall, Board President, to approve the minutes as presented from the Board of Directors Study Session on 04-10-25.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

V. Public Comment - Closed Session

A. Public Comment

Non-Agendaized Topic:

Andrew Gibbs made a public comment alleging noncompliance with mandated reporting and equal protection laws related to a domestic violence restraining order involving Joseth Alexandre and requested immediate corrective action by the Board.

Superintendent Krista Woodgrift briefly responded that Mr. Gibbs has previously been informed as to how Sage Oak's actions have been in compliance with all applicable laws.

VI. Adjourn to Closed Session

A. The Board Will Consider and May Act on Any of the Closed Session Matters

M. Humphrey made a motion to W. Hall, Board President, to adjourn to Closed Session at 9:07 a.m.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

VII. Closed Session

A. Closed Session Agenda

1. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION

(Gov. Code Section 54956.9(d)(4)) [One matter]

2. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION

(Gov. Code Section 54956.9(d)(1))

a. Lares v. The Collaborative Charter Services Organization, et al.

3. PUBLIC EMPLOYEE PERFORMANCE EVALUATION

Pursuant to Gov. Code 54957

a. Annual Performance Evaluation, Superintendent of Schools/CEO

VIII. Reconvene Regular Meeting

A. Report Out Any Action Taken in Closed Session

The Regular Meeting of the Board of Directors reconvened at 9:58 a.m. W. Hall, Board President, reported that no action was taken in Closed Session.

IX. Public Comments/Recognition/Reports

A. Public Comment

There was no request for public comment.

X. Correspondence/Proposals/Reports

A. Principals' Year in Review

Chelsey Anema, Director of Personalized Learning/Principal, Lana Beshara, Director of Virtual Learning/Principal, and Traci King, Director of Secondary Education/High School Principal, presented the 2024-2025 school year in review.

B. Student Highlight

Chelsey Anema, Director of Personalized Learning/Principal, Kylie Duncan, Personalized Learning TK-8 Academy Assistant Principal, and Alison James, teacher, presented a student highlight featuring Julien Farewell.

C. Teacher Appreciation

Chelsey Anema, Director of Personalized Learning/Principal, Lana Beshara, Director of Virtual Learning/Principal, and Traci King, Director of Secondary Education/High School Principal, presented the teacher appreciation highlights, recognizing Shirlee Fisher

(Personalized Learning Academy), Madison Ramer (Virtual Learning Academy) and Brandy Yurkosky (Educational Advisor & Regional Mentor).

D. AI Update - Building Smarter AI (Part 2)

Brad Bookser, Director of Information Technology, presented an AI update on customizing chatbots using Sage Oak data.

XI. Consent Agenda

A. Consent - Business Services

1. Check Register - March 2025
2. Check Register - April 2025
3. Report of Investment Activity - February 2025
4. Report of Investment Activity - March 2025
5. Ratification of CliftonLarsonAllen LLP Statement of Work - Tax Exempt Returns and Filings
6. Ratification of CloudHesive, LLC Change Order Form
7. Ratification of Otter.ai, Inc. Service Order
8. Ratification of WPENGINE, Inc. Service Order Form (Renewal)
9. Ratification of Sage Intacct, Inc. Agreement (Renewal)
10. Ratification of Centerpoint Church Facility Use Request and Agreement Form
11. Ratification of Wendy Cleaning Services Agreements
12. Ratification of CloudHesive Statement of Work
13. Ratification of City of Redlands Use of Facilities Agreement
14. Ratification of 2025-2026 BoardOnTrack Membership Agreement (Renewal)
15. Ratification of Springhill Suites Corona Riverside Banquet Event Order
16. Magic School, Inc. Quote and Order Form (Renewal)
17. Cidi Labs Terms and Conditions, Enterprise SaaS License and Support Services
18. Rossmoor Community Services District User Permit
19. Association of Personalized Learning Schools & Services (APlus+) Contract Services Agreement (Renewal)
20. Standard Industrial Lease with 11 Alabama Partnership L.P.
21. Vehicle Purchasing Documents
22. City of Yucaipa Community Services Permit #R7251
23. Complete Trailers of CA, LLC Quote
24. Courtyard by Marriott Event Sales Agreement Contract

B. Consent - Education Services

1. Ratification of AVID Center Products and Services Quote/Order (Renewal)
2. Ratification of Zearn Master Services Agreement (Renewal)

3. Ratification of Renaissance Learning, Inc. Quote #Q-126071 v2 and Terms of Service

C. Consent - Human Resources

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Approval of Job Descriptions
4. Approval of 2025-2026 Certificated Employee Work Year Calendars
5. Approval of 2025-2026 Classified Employee Work Year Calendars
6. Ratification of 2025-2028 Memorandums Of Understanding (MOU) - Center for Teacher Innovation (CTI) Induction Program
7. Approval of Change to Employer Contribution Rates for Employee Benefits Plans

D. Consent - Operations & Accountability

1. Ratification of Parsec Education, Inc. Service Order and Terms & Conditions (Renewal)

E. (Action) Approval of Consent Agenda

Items listed under Consent are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Agenda upon the request of any member of the Board, discussed, and acted upon separately.

S. Houle made a motion to W. Hall, Board President, to approve the items listed under the Consent Agenda as presented.

M. Humphrey seconded the motion.

The board **VOTED** unanimously to approve the motion.

XII. Human Resources

A. (Action) Approval of Assistant Superintendent of Human Resources Candidate

P. Matz made a motion to W. Hall, Board President, to approve Dr. Tamar Kataroyan as Assistant Superintendent of Human Resources, including the salary schedule placement as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

B. (Action) Approval of Employer Contribution Increase to Employee Flexible Spending Accounts (FSA)

S. Houle made a motion to W. Hall, Board President, to approve the employer contribution increase to Employee Flexible Spending Accounts as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

C. (Action) Approval of Declarations of Need (DON) for the 2025-2026 School Year

M. Humphrey made a motion to W. Hall, Board President, to approve the Declarations of Need (DON) for the 2025-2026 school year as presented.

P. Matz seconded the motion.

The board **VOTED** unanimously to approve the motion.

XIII. Calendar

A. Future Meetings

The next scheduled meeting will be a Regular Board of Directors Meeting held on June 12, 2025.

XIV. Comments

A. Board Comments

Board members expressed gratitude for the dedication and hard work of staff, acknowledging the positive impact on Sage Oak's reputation and success. They praised the quality of new hires, celebrated the involvement of students and parents, and congratulated the teachers for their achievements.

B. Superintendent Comments

Superintendent Woodgrift thanked the principals for their leadership and vision, noting how they consistently go beyond expectations, and recognized Erin Bunch, Assistant Superintendent of Education Services, for her efforts in building collaboration with the principals. She also reminded everyone about the upcoming graduation on June 4, 2025.

XV. Closing Items

A. Adjourn Meeting

S. Fraire made a motion to W. Hall, Board President, to adjourn the Regular Meeting of the Board of Directors on May 8, 2025.

P. Matz seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 10:58 AM.

Respectfully Submitted,

W. Hall

Documents used during the meeting

- Sage Oak Highlights_March & April 2025.pdf
- Principals' Year in Review_5.8.2025.pdf
- Student Highlight_Julien Farewell_5.8.2025.pdf
- Teacher Appreciation_5.8.2025.pdf
- AI Update_Building Smarter AI_Part 2_5.8.2025.pdf
- BUS Consent - Business Services_5.8.2025.pdf
- BUS Consent - Education Services_5.8.2025.pdf
- BUS Consent - Human Resources_5.8.2025.pdf
- BUS Consent - Operations & Accountability_5.8.2025.pdf
- FSA Overview_5.8.2025.pdf
- 2025-2026 Declaration of Need_Sage Oak Charter School (#1885)_5.8.2025.pdf
- 2025-2026 Declaration of Need_Sage Oak Charter School - Keppel (#1886)_5.8.2025.pdf
- 2025-2026 Declaration of Need_Sage Oak Charter School - South (#2051)_5.8.2025.pdf

FOR MORE INFORMATION

For more information concerning this agenda, contact
Sage Oak Charter Schools.

Coversheet

2024-2025 School Year in Review

Section:	X. Correspondence/Proposals/Reports
Item:	A. 2024-2025 School Year in Review
Purpose:	
Submitted by:	
Related Material:	Sage Oak Highlights_May 2025.pdf



Excellence through Personalized Learning

MAY HIGHLIGHTS

GOAL #1: STUDENT SUCCESS



GOAL #2: ENGAGEMENT

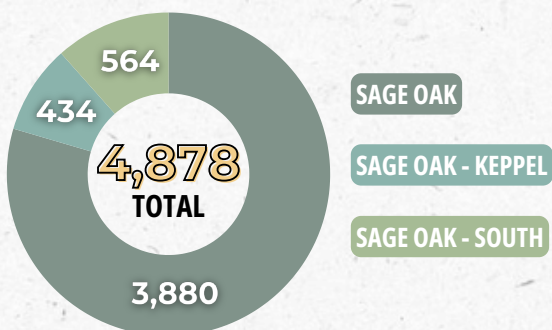


GOAL #3: SMART LEARNING SYSTEMS

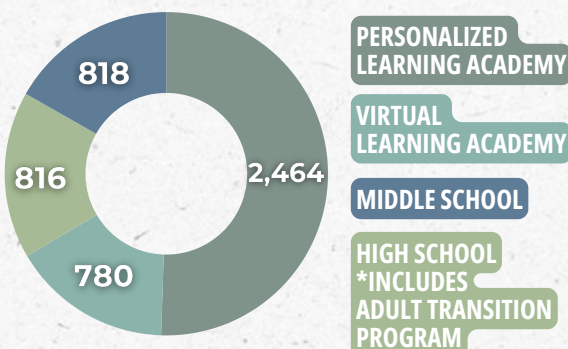


CURRENT ENROLLMENT

BY SCHOOL



BY PROGRAM



A LOOK INSIDE THIS ISSUE....

GOAL #1 FEATURED HIGHLIGHTS:

- **Over 480** Kindergarten, 5th, and 8th graders promoted through the Virtual Learning Academy, with a ceremony celebrating their achievements!
- In May, more than **180 Sage Oak students** participated in college- and career-connected field trips.

GOAL #2 FEATURED HIGHLIGHTS:

- Sage Oak hosted the CCSA Regional Meeting on May 29th, featuring Raquel Maden discussing advocacy, renewals, and strategy.
- Superintendent Krista Woodgrift and fellow Sage Oak leaders joined hundreds at the State Capitol for the AB 84 hearing, showing advocacy for students.

GOAL #3 FEATURED HIGHLIGHTS:

- The Facilities team moved from the old 5,711-square-foot warehouse to a **new 33,100-square-foot facility**, providing more space for curriculum, technology, and supplies.
- The AI Committee trained and launched a pilot for Brisk Teaching AI, integrating Google Classroom and Canvas to streamline assignments, grading, and communication.

CLASS OF 2025



[CLICK HERE](#) to see where our 2025 grads are going!

[CLICK HERE](#) to view the graduation ceremony!

GOAL #1: STUDENT SUCCESS



VLA End-of-Year Promotion & Social

The Virtual Learning Academy wrapped up the school year with a promotion ceremony honoring Kindergarten, 5th, and 8th-grade students on May 30th. Their hard work and achievements were recognized, marking a meaningful milestone in their educational journey. We were especially proud to have support from our high school students in our Child and Development Career Technical Education (CTE) pathway, who volunteered to assist with the activities for our students.



Emma's Path to Graduating Early!



Sage Studio host Tiffany Webster interviewed Emma Pierce, a 10th grader at Sage Oak on track to graduate early. Emma discussed how Sage Oak's personalized schedule helps her balance dual enrollment with horseback riding, martial arts, and volunteer work.

Teacher Spotlight: Mrs. Quadai's Compassion

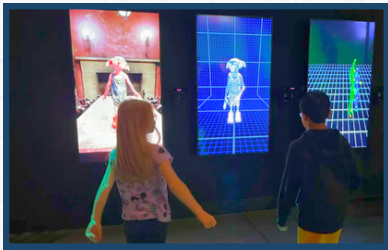


As a Navy spouse and personalized learning teacher, Mrs. Britney Quadai brings unique insight and empathy to her work with military-connected students. She ensures families feel supported and understood, helping them navigate transitions with confidence. As a Purple Star School, her dedication reflects our commitment to flexible, high-quality education for those who serve. Click [HERE](#) to watch the interview!

GOAL #1: STUDENT SUCCESS

Field Trips Foster Career Exploration

In May, **over 180** Sage Oak students participated in career-connected field trips across various industries. Students visited Cal State San Bernardino to explore computer science, toured Warner Bros. Studios to learn about media careers, learned about agriculture at Kenny's Strawberry Farm, and discovered physics and engineering at Knott's Berry Farm. These hands-on experiences brought classroom learning to life!



Knott's
BERRY FARM



Counseling with CASEL Framework



This month, the Counseling team led Oakschool classes based on the CASEL framework, including Connections Count, which supported social awareness and relationship skills for TK-8 students.

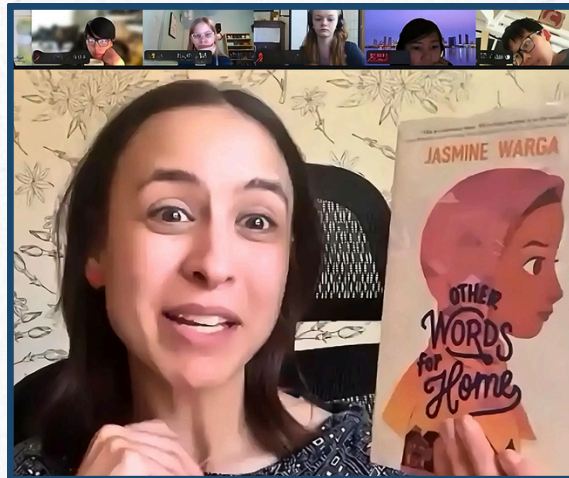
Hopping High in Math: Kangaroo Champs!



Earlier this year, our PAGE students proudly represented our program in the prestigious Math Kangaroo competition. We are thrilled to announce that **three students achieved national rankings!**



Page-Turners & Author Adventures



The PAGE Book Club explored *Other Words from Home* by Jasmine Warga, a novel in verse about a young Syrian girl's journey, identity, and sense of belonging. The club wrapped up with a virtual author visit, where Warga shared insights into her writing process and led inspiring discussions on resilience and empathy.

Aviation and History at the March Air Force Museum



On May 2nd, PAGE students visited the March Field Air Museum in Riverside where they learned about U.S. Air Force history through hands-on exhibits and a guided tour of **over 50 retired aircraft.**

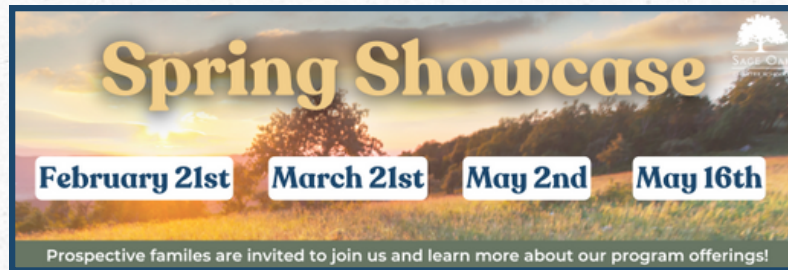
All Things Arboretum

PAGE families visited the CSU Fullerton Arboretum on May 12th, following a preparatory Zoom session on biomes. Students explored diverse plant habitats with nature journals in hand, deepening their understanding of ecology and plant science through hands-on observation.



GOAL #1: STUDENT SUCCESS

Discovering Sage Oak through Spring Showcase!



Multiple Sage Oak Spring Showcases were held to welcome prospective families and highlight the school's dynamic learning community. Each event featured an "Art in the Park" session, where families participated in a hands-on art lesson led by an Oakschool teacher, offering a glimpse into the school's creative, student-centered approach.

7th Grade VLA Students Explore College and Career Pathways



7th grade VLA students continued exploring college and career pathways. Building on the interest survey taken at the beginning of the year, they completed a career personality survey, discussed their results, and added their reports to their Google Site portfolios.

They also explored scholarship opportunities, discovering how academics connect to future pathways.

AVID Success Stories at Sage Oak



Enrollment for the 2025–26 AVID program is now open. AVID teacher Temma Dale and current students recently visited 8th-grade Oakschool and Virtual Learning Academy (VLA) classes to share information about AVID 9 opportunities. Sage Oak also submitted final documentation for high school AVID certification. A recent walkthrough of seven VLA classrooms confirmed that AVID practices align with key instructional priorities, including reading, writing, and collaboration.



"The Breakfast Club" Launch

Sage Oak launched "The Breakfast Club," a five-week virtual series connecting students with guest speakers from Pathful, our career exploration platform. Culinary arts, medicine, military service, public safety, and fashion design professionals shared career insights and answered student questions in live, interactive sessions.

Hello Students!

Michele Reid, Lieutenant Colonel, U.S. Army (Retired)
Originally from Livonia, Michigan
lives in Tennessee

served in the US Army for 24 years. I lived in many states and deployed to Iraq for one year and Kuwait for two years.

Career:
US Army officer for 24 years
Lived in eight states (including Hawaii)
Visited 49 of 50 US States
Been to 15 countries
Four Deployments (Bosnia, Iraq & Kuwait twice)
Field: logistics & supply chain management
Retired May 2019

Enrollment for CTE-Aligned Classes Take Off

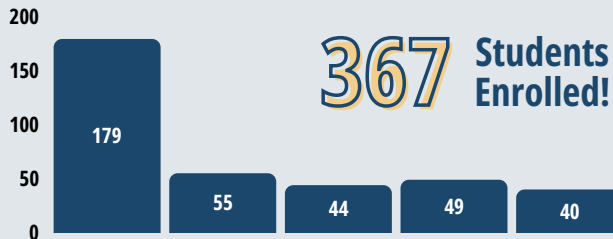


Approximately 1,250 students were enrolled in CTE-aligned classes during the 2024–25 school year. These courses, along with our guest speaker series and enrichment activities, provided meaningful exposure to career pathways and personal interests.

GOAL #1: STUDENT SUCCESS

Career Technical Education (CTE) Updates

Student Enrollments by Pathway



Child Development and Family Services

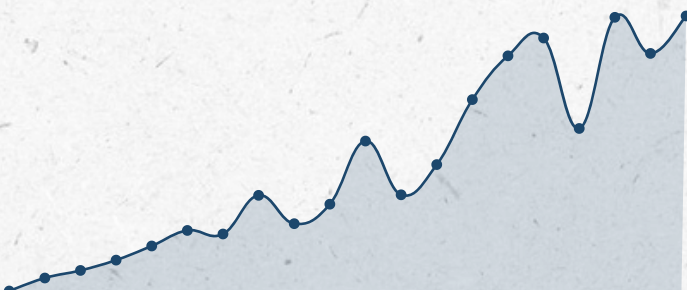


In May, the Child Development course focused on how to keep infants and toddlers safe, covering CPR, first aid for common injuries, and emergency response skills.

Information Technology



Introduction to Computer Science students explored advanced AI tools, using text-to-text, image, and animation to process and present data. They also learned to convert CSV files into graphs like histograms, pie charts, and line charts.



Arts, Media and Entertainment



Introduction to Arts, Media, and Entertainment students created original characters and explored animation with guest speaker Pablo Leon, an award-nominated illustrator and art director known for projects with Disney, Warner Bros., and Marvel.

Students then shifted to game design, exploring related careers, developing project themes, and interviewing industry professionals.



AP Studio Art students attended the Laguna College of Art and Design VIP Graduation presentations, where they showcased original works from their Sustained Investigation projects.



Each piece reflected a personal theme or question, exploring topics such as identity, social issues, and creative techniques, and highlighting the students' artistic development and intent.

In Animation 2, students explored the animation pipeline by creating pre-production elements for a short film, including scripts, storyboards, character turnarounds, and colored backgrounds.

GOAL #1: STUDENT SUCCESS

Marketing and Entrepreneurship



In Marketing and Entrepreneurship, the last unit of the semester was all about market research. Each student made a market and S.W.O.T. Analysis for their businesses. They also created promotional flyers.

Sports Medicine



Sports Medicine 1 students studied injury types, assessment, and taping and bandaging for the ankle, knee, and shoulder, and earned certification in injury prevention, and facility management.

Sports Medicine 2 students are learning “The Business of Being Fit,” covering topics like setting up facilities, creating spaces, protecting client information.

Celebrating Seniors: ASB’s Year of Events and Connection

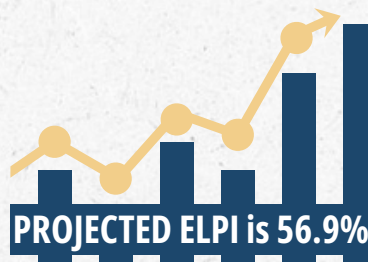


Sage Oak students ended the school year with a series of memorable celebrations. Prom kicked off the festivities at the House of Blues in Anaheim, where a masquerade theme set the tone for an evening of fun! Seniors continued the celebration with Grad Nite at Disneyland and a Senior Sunset, reflecting on their accomplishments and time together. To wrap up the year, students from all regions gathered in Huntington Beach for an ASB-organized beach hangout, closing the year with sunshine, laughter, and a strong sense of community.

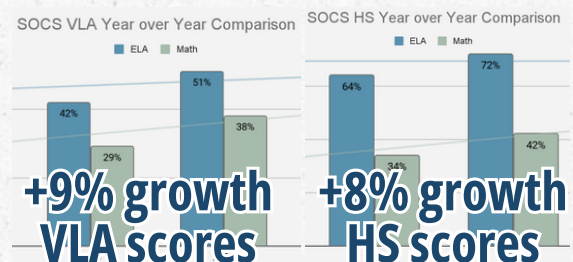


Celebrating Outstanding Assessment Participation

Both the local and state assessment windows have officially closed with outstanding participation rates—**99.9%** for local assessments and **99.5%** for California state assessments. These high levels of engagement reflect the dedication of our students, families, and staff. Preliminary results from both assessments are encouraging and indicate positive trends in student performance.



Powered by BoardOnTrack



GOAL #2: ENGAGEMENT



Coastal Cleanup in San Diego



Sage Oak families had the opportunity to participate in the South Ponto State Beach Clean Up this month. Equipped with gloves, bags, and a shared purpose, students, parents, and teachers helped remove litter from the shoreline, contributing to a cleaner, healthier coastal environment.

Inland Empire CCSA Meeting at Sage Oak Office

Sage Oak hosted the CCSA Regional Meeting for the Inland Empire at the Sage Oak offices in Redlands on May 29th. The meeting was led by CCSA Vice President of SoCal Advocacy, Raquel Maden. Raquel discussed advocacy efforts and charter renewals. The meeting brought together local charter leaders for a discussion on charter school advocacy and strategic legislative planning, reinforcing our collective commitment to supporting high-quality educational options for all students.



Warner Charter Liaison Meets the Team!

On May 7th, Julie Osuna, Charter Liaison from Warner School District, visited the Sage Oak office. She met with Senior Director of Outreach and Development Larry King, who provided a tour and introduced her to leadership team members. During her visit, Julie observed a Personal Learning Community (PLC) session, giving her a firsthand look at Sage Oak's collaborative and student-focused professional development.

Standing Up for Students at the Capitol

On April 30th, Sage Oak leaders Krista Woodgrift, Erin Bunch, Lisa Thompson, and Larry King joined hundreds of charter school parents, educators, and advocates at the State Capitol for the Senate Education Committee hearing on Assembly Bill 84 (AB 84).



Helendale Annual Update Caps Off a Decade of Partnership



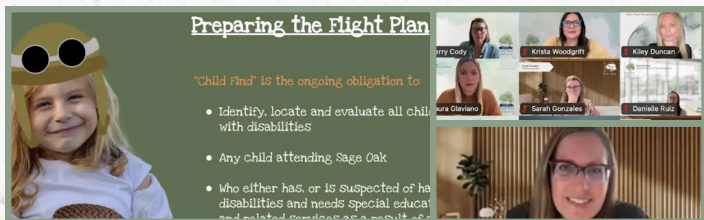
On May 14th, Larry King presented Sage Oak's annual authorizer update to the Helendale School District Board, marking 10 years since the district first approved our charter in 2014.

We shared strong results in enrollment, academic achievement, and fiscal health, as well as continued innovation through programs like Oakschool.

Virtual Visit with Senator Ashby's Office

On May 22nd, Larry King and Kiley Duncan, Personalized Learning Academy Assistant Principal, hosted a virtual visit with Amaya Childes, a staffer for Senator Angelique Ashby. Joined by Superintendent Krista Woodgrift, they showcased three virtual classrooms, where Amaya observed reading, math, and science instruction and praised the teaching and student engagement.

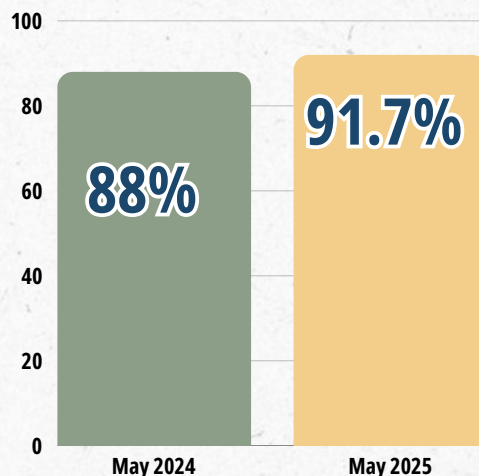
Leading Change Through Thoughtful Action



On May 13th, the Leadership Academy focused on leading change using the *Our Iceberg Is Melting* metaphor, emphasizing the need to recognize change, build team support, and take strategic action. The session also used a flight plan analogy to explore special education, highlighting the importance of individualized planning, ongoing adjustments, and coordinated support to help every student reach their goals.

Staff Retention Rate Continues to Increase

Our staff retention for the month of April is **up 91.7%** from this time last year at 88%.



GOAL #3: SMART LEARNING SYSTEMS



NEW WAREHOUSE ALERT!

The Facilities team began relocating from the old 5,711-square-foot warehouse to a **new 33,100-square-foot facility**, providing ample space to store new curriculum, student and staff technology devices and equipment, and other school supplies.

EMPOWERING TEACHERS WITH BRISK TEACHING AI

The AI Committee recently launched a pilot group to explore Brisk Teaching AI, a tool that integrates with Google Classroom and Canvas to help teachers generate assignments, differentiate instruction, and provide feedback. Brisk automates tasks like grading, IEP progress tracking, and parent communication, streamlining teachers' workflows.

LAUNCHING OUR NEW IT RESOURCE & KNOWLEDGE BASE

Sage Oak is currently developing a new IT Resource and Knowledge Base, a centralized, self-service portal for tech support. Featuring AI-powered assistance and a growing library of help articles, the platform will guide users to quick answers and offer easy access to Help Desk support when needed. This tool will enhance efficiency and accessibility for our entire school community.



Coversheet

Sage Oak Charter Schools Leadership Honorees

Section:	X. Correspondence/Proposals/Reports
Item:	B. Sage Oak Charter Schools Leadership Honorees
Purpose:	
Submitted by:	
Related Material:	Sage Oak Charter Schools Leadership Honorees_6.12.2025.pdf



Sage Oak Leadership Honorees



Brenda Ramirez

ASB & Student Success Support



- Co-founded High School Program
- Integral part of creating student council (now ASB), our first prom, homecoming, senior sunrise, senior sunset, grad nite
- Establish our NCAA list for our student athletes
- Led National Honor Society, Student volunteer committee, yearbook committee and countless others



Candice Coffey

Assistant Superintendent Human Resources



- She has served for 10 years, co-creating the school
- Candice built the HR department from the ground up
- Helped shape Sage Oak's positive culture
- Created a statewide professional learning network (PLN)
- Her fingerprints are on every system, every policy, and every part of what makes this a great place to work



From all of us,
thank you

Coversheet

CliftonLarsonAllen LLP (CLA) Governance Entrance Letter

Section:	X. Correspondence/Proposals/Reports
Item:	C. CliftonLarsonAllen LLP (CLA) Governance Entrance Letter
Purpose:	
Submitted by:	
Related Material:	CliftonLarsonAllen LLP (CLA) Governance Entrance Letter_6.12.2025.pdf



CliftonLarsonAllen LLP

2210 East Route 66
Glendora, CA 91740

phone 626.857.7300 fax 626.857.7302
CLAconnect.com

May 27, 2025

To the Board and Management of
Sage Oak Charter Schools

We are engaged to audit the financial statements of Sage Oak Charter Schools as of and for the year ended June 30, 2025. Professional standards require that we communicate to you the following information related to our audit. We will contact you to schedule a meeting to discuss this information since a two-way dialogue can provide valuable information for the audit process. We ask if you have any questions or need clarification to any of email the following: Wade.McMullen@claconnect.com, Derrick.Debruyne@claconnect.com, Lili.Huang@claconnect.com, Marlen.Gomez@claconnect.com.

Deadline, Timelines and Meetings

Audit reports must be filed with the CDE, the State Controller's Office (SCO), the local County Superintendent of Schools, and, if applicable, the chartering entity, by **December 15** of each year.

To file the report on or before the December 15, 2025 state deadline:

- Spring interim and final field work will be scheduled with assistance from management and interim deadlines will be established.
- We will schedule an interim exit meeting with management and certain members of governance to discuss any audit issues. This will ensure that all interim audit work and personnel interviews are complete by **August 1, 2025**. We will also use this meeting to revisit and re-confirm final audit fieldwork dates and the governance meeting date to review the audit draft.
- Final fieldwork scheduling dates will need to be prior to **October 31, 2025**, if possible. If final fieldwork dates are scheduled after this date, all information requested must be received by **October 31, 2025**.
- We request that basic financial information (**trial balance and general ledger as of June 30, 2025 and general ledger for the next fiscal year**) be transmitted to us no later than August 12, 2025. Earlier transmittal is strongly encouraged.
- In order to file the report on or before the December 15 state deadline, **all audit information requests made prior to October 20, 2025 should be received no later than October 31, 2025**. This will allow us the time needed to complete the audit and submit our working-papers to our national assurance quality control team.

If a *significant amount* of the audit information requests are not received by the specified dates, we will send a letter to Board and Management specifying the extent of outstanding information and possibly recommend notifying Sage Oak Charter Schools's authorizer that an audit report filing extension to **January 31, 2025** is needed. **The decision to apply for this extension is solely the responsibility of Sage Oak Charter Schools's Board and Management.**

Our responsibility under Auditing Standards Generally Accepted in the United States of America and Government Auditing Standards***Financial statements, internal control, and compliance***

We will conduct our audit in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit.

Those standards also require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements and material noncompliance, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinions. The risk of not detecting a material misstatement or a material noncompliance resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under U.S. GAAS and *Government Auditing Standards*.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.
- Form and express an opinion about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America.
- Plan and perform the audit to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the

aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

- Perform, as part of obtaining reasonable assurance about whether the financial statements as a whole are free from material misstatement, tests of the entity's compliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our tests is not to provide an opinion on compliance with such provisions and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.
- Provide a report (which does not include an opinion) on internal control over financial reporting and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*.
- Communicate significant matters related to the financial statement audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures specifically to identify such matters.
- Communicate circumstances that affect the form and content of the auditors' report.
- Communicating any matters relevant to compliance with the *California State K-12 Audit Guide*.

Our responsibility under Auditing Standards Generally Accepted in the United States of America, *Government Auditing Standards*, and Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards Financial statements, internal control, and compliance

If it is determined that Sage Oak Charter Schools has expended more than \$750,000 in federal funds during the course of the year being audited, the additional following responsibilities apply:

We will conduct our audit in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS); the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). In addition to the Auditing Standards Generally Accepted in the United States of America and *Government Auditing Standards*, we will:

- Obtain an understanding of internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control over compliance. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control over compliance that we identify during the audit that are required to be communicated.

- Plan and perform the audit to obtain reasonable assurance about whether material noncompliance with the applicable compliance requirements occurred. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with U.S. GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. Material noncompliance can arise from fraud or error and is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report.
- Perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with the direct and material compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.
- Consider internal control over compliance with requirements that could have a direct and material effect on a major federal program in order to determine our auditing procedures for the purpose of expressing our opinion on compliance and to test and report on internal control over compliance in accordance with the Uniform Guidance.
- Perform tests of transactions and other applicable procedures described in the “OMB Compliance Supplement” for the types of compliance requirements that could have a direct and material effect on each of the entity’s major programs. The purpose of these procedures will be to express an opinion on the entity’s compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance. While our audit will provide a reasonable basis for our opinion, it will not provide a legal determination on the entity’s compliance with those requirements.
- Provide a report on internal control over compliance related to major programs and express an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Uniform Guidance.
- Our responsibility for the schedule of expenditures of federal awards (SEFA) accompanying the financial statements, as described by professional standards, is to evaluate the presentation of the SEFA in relation to the financial statements as a whole and to report on whether the SEFA is fairly stated, in all material respects, in relation to the financial statements as a whole. We will make certain inquiries of management and evaluate the form, content, and methods of preparing the SEFA to determine whether the SEFA complies with the requirements of the Uniform Guidance, the method of preparing it has not changed from the prior period, and the SEFA is appropriate and complete in relation to our audit of the financial statements. We will compare and reconcile the SEFA to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

Our audit of the financial statements does not relieve you or management of your responsibilities.

We gave significant consideration to assisting management with the preparation of the financial statements to be provided, which may reasonably be thought to bear on independence, in reaching the conclusion that independence has not been impaired.

Supplementary information in relation to the financial statements as a whole

Because we were engaged to report on the supplementary information accompanying the financial statements, our responsibility for other supplementary information accompanying the financial statements, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole. We will make certain inquiries of management and evaluate the form, content, and methods of preparing the information to determine whether the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We will compare and reconcile the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

Planned scope and timing of the audit

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested.

Our audit of the financial statements will include obtaining an understanding of the entity and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. We will generally communicate our significant findings at the conclusion of the audit. However, some matters may be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

Although our audit planning has not been concluded and modifications may be made, we have identified the following significant risk(s) of material misstatement as part of our audit planning:

- Revenue recognition
- Management override of controls

As a result of unexpected events, changes in conditions, or the audit evidence obtained from the results of audit procedures performed, we may need to modify the overall audit strategy and audit plan and, thereby, the resulting planned nature, timing, and extent of further audit procedures, based on the revised consideration of assessed risks.

We expect to begin our audit in the Spring of 2025 and issue our report no later than December 15, 2025.

Other planning matters

Recognizing the importance of two-way communication, we encourage you to provide us with information you consider relevant to the audit. This may include, but is not limited to, the following items:

- Your views about the following matters:
 - The appropriate person(s) in the entity's governance structure with whom we should communicate.
 - The allocation of responsibilities between those charged with governance and management.
 - The entity's objectives and strategies and the related business risks that may result in material misstatements.
 - Matters you believe warrant particular attention during the audit and any areas for which you request additional procedures to be undertaken.
 - Significant communications between the entity and regulators.
 - Other matters you believe are relevant to the audit of the financial statements.
- The attitudes, awareness, and actions of those charged with governance concerning (a) the entity's internal control and its importance in the entity, including how those charged with governance oversee the effectiveness of internal control, and (b) the detection or the possibility of fraud.
- The actions of those charged with governance in response to developments in law, accounting standards, corporate governance practices, and other related matters, and the effects of such developments on, for example, the overall presentation, structure, and content of the financial statements, including the following:
 - The relevance, reliability, comparability, and understandability of the information presented in the financial statements.
 - Whether all required information has been included in the financial statements, and whether such information has been appropriately classified, aggregated or disaggregated, and presented.
- The actions of those charged with governance in response to previous communications with the auditor.
- Your understanding of the risks of fraud and the controls in place to prevent and detect fraud, including your views on the following matters:
 - The “tone at the top” conveyed by management.

- The risk that the entity's financial statements or schedule of expenditures of federal awards might be materially misstated due to fraud.
- Programs and controls that the entity has established to mitigate identified fraud risks or that otherwise help to prevent, deter, and detect fraud.
- How and how often you review the entity's policies on fraud prevention and detection.
- If a fraud hotline is in place, how it is monitored and how you are notified of allegations or concerns.
- How you exercise oversight of management's processes for identifying and responding to the risks of fraud and the programs and controls management has established to mitigate those risks.
- The risks of fraud at the entity, including any specific fraud risks the entity has identified or account balances, classes of transactions, or disclosures for which a risk of fraud may be likely to exist.
- Examples of fraud-related discussions management has had with you.
- Any actual or suspected fraud affecting the entity or its federal award programs that you are aware of, including measures taken to address the fraud.
- Any allegations of fraud or suspected fraud (e.g., received in communications from employees, former employees, grantors, regulators, or others) that you are aware of.
- Any knowledge of possible or actual policy violations or abuses of broad programs and controls occurring during the period being audited or the subsequent period.
- Any accounting policies or procedures applied to smooth earnings, meet debt covenants, minimize taxes, or achieve budget, bonus, or other financial targets that you are aware of; and whether you are aware of any accounting policies that you consider aggressive.
- How you oversee the entity's (1) compliance with laws, regulations, and provisions of contracts and grant agreements, (2) policies relative to the prevention of noncompliance and illegal acts, and (3) use of directives (for example, a code of ethics) and periodic representations obtained from management-level employees about compliance with laws, regulations, and provisions of contracts and grant agreements.
- Whether you are aware of any noncompliance with laws, regulations, contracts, and grant agreements, including measures taken to address the noncompliance.
- If the entity uses a service organization, your knowledge of any fraud, noncompliance, or uncorrected misstatements affecting the entity's financial statements or federal award programs reported by the service organization or otherwise known to you.

* * *

This communication is intended solely for the information and use of the Board of Directors and management of Sage Oak Charter Schools and is not intended to be, and should not be, used by anyone other than these specified parties.

Sincerely,

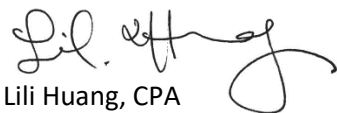
CliftonLarsonAllen LLP



Wade McMullen, CPA
Principal
626-857-7300
Wade.McMullen@claconnect.com



Derrick DeBruyne, CFE, CPA
Principal
626-857-7300
Derrick.DeBruyne@claconnect.com



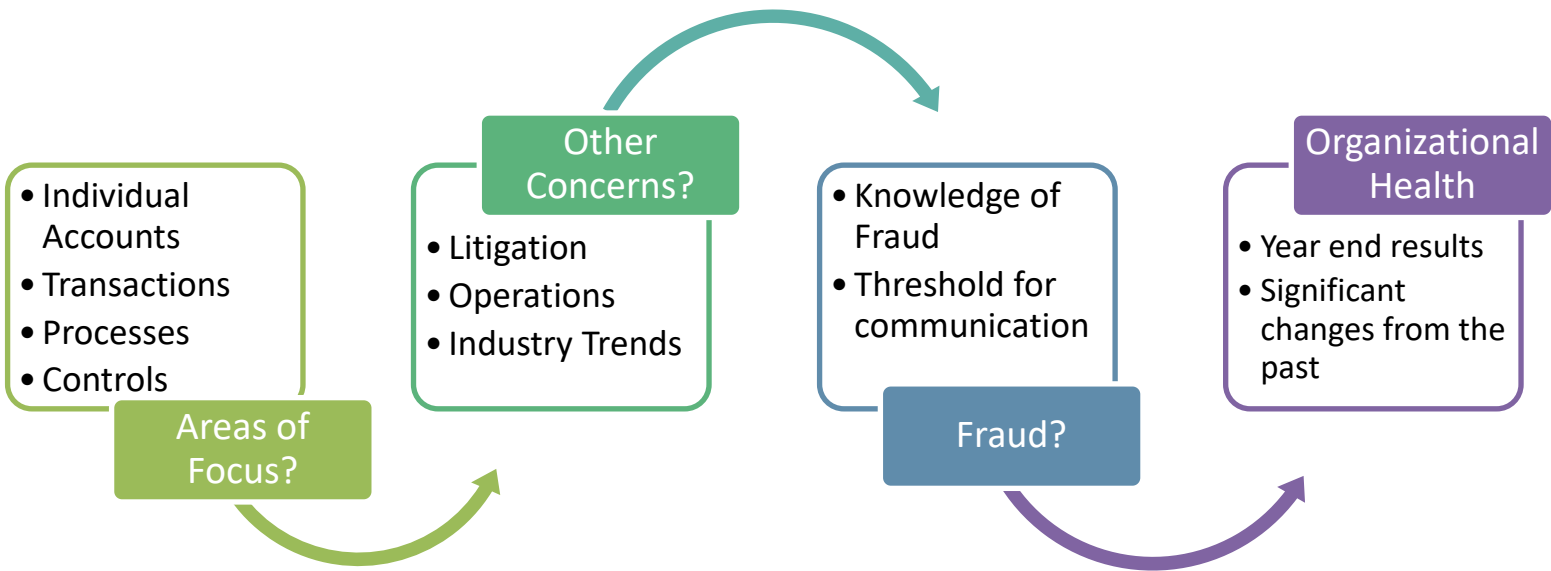
Lili Huang, CPA
Principal
626-857-7300
Lili.Huang@claconnect.com



Marlen Gomez, CPA
Principal
626-857-7300
Marlen.Gomez@claconnect.com

Create Opportunities
We promise to know you and help you.

Governance and Management



Ask us how we can help you with:

- CARES Act Funding and applicable Single Audit
- New accounting system
- Digital Analytics and Data

Resource Tools

CLACONNECT:
<https://www.clacconnect.com/industries/nonprofit#Resources>
Charter School Audit Guide: <http://eaap.ca.gov/>
OMB Compliance Supplement: <https://www.fac.gov/compliance/>
CDE Revenue Funding: <https://www.cde.ca.gov/fg/fo/fr/>

Implementing best practices

- Observation: Changes in personnel and operations have focused more attention on processes and procedures.
- Recommendation: CLA business opportunity assessment to analyze your structure, process and systems.

Cybersecurity and risk management

- Observation: Cyber attacks are a prevalent threat and constantly evolving.
- Recommendation: CLA professionals can analyze key aspects of cybersecurity and make specific recommendations for your organization.

Financial planning and wealth management

- Observation: High 401(k) fees
- Recommendation: CLA Retirement Plan Diagnostic with CLA Wealth Advisor



CLACONNECT.COM

WEALTH ADVISORY
OUTSOURCING
AUDIT, TAX, AND
CONSULTING

Coversheet

Consent - Business Services

Section:	XI. Consent Agenda
Item:	A. Consent - Business Services
Purpose:	
Submitted by:	
Related Material:	BUS Consent - Business Services_6.12.2025.pdf

SAGE OAK CHARTER SCHOOLS

Regular Meeting of the Board of Directors - June 12, 2025

BUS Consent Items - Business Services

Items listed under Consent are considered routine and will be approved/adopted by a single motion.

1. Item: [Check Register - May 2025](#)
2. Item: [Report of Investment Activity - April 2025](#)
3. Item: Ratification of [Victorville Chevrolet Cadillac Sale Contracts](#)

Background:

Sage Oak Charter Schools requests the Board ratify the sale contracts to purchase a Chevrolet 4500 XD LCF Diesel box truck and a Chevrolet Silverado MD box truck from Victorville Chevrolet Cadillac to support the logistical needs of the school. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Victorville Chevrolet Cadillac Sale Contracts as presented.

4. Item: Ratification of [School Pathways Quote Forms with Sage Oak Charter Schools](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the quote forms with School Pathways for the 2025-2026 school year. Sage Oak has been using School Pathways as its cloud-based student information system for several years. This renewal agreement continues our student information system services management for the 2025-2026 school year. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the School Pathways Quote Forms with Sage Oak Charter Schools, as presented.

5. Item: Ratification of [School Pathways Quote Form, SOW #19581](#)

Background:

Sage Oak Charter Schools requests the Board ratify the School Pathways quote form. The primary benefit of this agreement is to improve Sage Oak's data integration capabilities, ensuring more efficient and compliant staff data management. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the School Pathways Quote Form, SOW #19581, as presented.

6. Item: Ratification of [School Pathways Quote Form, SOW #20274](#)

Background:

Sage Oak Charter Schools requests the Board ratify the quote from School Pathways to improve how the school tracks curriculum assignments. School Pathways will add a new field, or "indicator," to track the curriculum used by Sage Oak. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the School Pathways Quote Form, SOW #20274, as presented.

7. Item: Ratification of [Total Technology Quote No. D22238](#)

Background:

Sage Oak Charter Schools requests the Board ratify the Total Technology quote to enter into a buyback agreement, in partnership with Data Impressions, to sell a variety of used Chromebooks and related devices. This agreement helps Sage Oak efficiently manage its end-of-life IT assets, recover value from old devices, and ensure secure handling of sensitive data through certified data destruction processes. The buyback and associated local revenue generated is per policy 3145, the Disposal of Surplus, Obsolete, or Unneeded Books, Equipment, and Supplies Policy.

Recommendation:

It is recommended the Board ratify the Total Technology Quote No. D22238, as presented.

8. Item: Ratification of [City of Redlands Park Reservation QPR-2364](#)

Background:

Sage Oak Charter Schools requests the Board ratify the City of Redlands park reservation QPR-2364 for the Art in the Park Event scheduled for May 2, 2025. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the City of Redlands Park Reservation QPR-2364, as presented.

9. Item: Ratification of [Tech & Mortar, LLC Statement of Work](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the 2025-2026 Tech and Mortar, LLC statement of work for podcast hosting and production services. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Tech & Mortar, LLC Statement of Work as presented.

10. Item: Ratification of [Hyatt Place Riverside/Downtown Group Sales Agreement](#)

Background:

Sage Oak Charter Schools requests the Board ratify the Hyatt Place Riverside/Downtown Group Sales Agreement for supplemental hotel rooms for the 2025 August Summit. This will help facilitate staff meetings and professional development. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Hyatt Place Riverside/Downtown Group Sales Agreement as presented.

11. Item: Ratification of [School Services of California, Inc. Contract](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the School Services of California, Inc. contract to perform duties related to issues of school finance, including providing electronic delivery of the Fiscal Report, analysis of major school legislation, and other consulting duties as requested, for the

2025-2026 school year. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the School Services of California, Inc. Contract as presented.

12. Item: Ratification of [KnowBe4 Quote #Q-1281734](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the subscription for KnowBe4 for the remainder of the 2024-2025 school year and the 2025-2026 school year. KnowBe4 is a subscription that allows for staff to easily submit received suspicious emails for further investigation. This service provides analytics tools for emails that have been submitted for investigation. It provides basic training for identifying malicious emails. The expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:

It is recommended the Board ratify the KnowBe4 Quote #Q-1281734, as presented.

13. Item: Ratification of [Pepper & Olive Letter of Agreement](#)

Background:

Sage Oak Charter Schools requests the Board ratify the letter of agreement with Pepper & Olive to design and renovate the new multipurpose room at 1455 Ford Street in Redlands. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Pepper & Olive Letter of Agreement as presented.

14. Item: Ratification of [BEC Industrial Estimate #SAGEOA-050925](#)

Background:

Sage Oak Charter Schools requests the Board ratify the BEC Industrial estimate for permitting and electrical installation at the new warehouse located at 451 Alabama Street in Redlands. The installation includes outlets, high-volume low-speed fans, and a charging station to ensure the building is equipped with the necessary power and cooling systems for effective operations. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the BEC Industrial Estimate #SAGEOA-050925 as presented.

15. Item: Ratification of [Fullerton Parks & Recreation Permit #16377](#)

Background:

Sage Oak Charter Schools requests the Board ratify the permit with Fullerton Parks & Recreation. The permit is for the use of the Fullerton Sports Complex for the Personalized Learning Academy, Fullerton Region, Art in the Park on May 16, 2025. The expense was approved on June 20, 2024, as part of the 2024-2025 Adopted Budget.

Recommendation:

It is recommended the Board ratify the Fullerton Parks & Recreation Permit #16377 as presented.

16. Item: Ratification of [Opichi LLC Agreement](#)

Background:

Sage Oak Charter Schools requests the Board ratify the agreement with Opichi LLC to provide remote AI coding support via Zoom for the development of an interactive math platform. This platform is designed to help students engage with Power Standards and prepare for math assessments. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Opichi LLC Agreement as presented.

17. Item: Ratification of [Newfront Property and Casualty Insurance Policy Renewals](#)

Background:

Sage Oak Charter Schools requests the Board ratify the proposal acceptance for insurance policies from the broker, Newfront Insurance Services. The proposal includes quote options from various insurers for *Package/Auto/Umbrella/Educators Legal, Crime, Student Accident, Workers' Compensation, and Cyber Liability*. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Newfront Property and Casualty Insurance Policy Renewals as presented.

18. Item: Ratification of [Tech to School Buyback Quote](#)

Background:

Sage Oak Charter Schools requests the Board ratify the Tech to School quote to enter into a buyback agreement to sell a variety of used devices. This agreement helps Sage Oak efficiently manage its end-of-life IT assets, recover value from old devices, and ensure secure handling of sensitive data through certified data destruction processes. The buyback and associated local revenue generated is per policy 3145, the Disposal of Surplus, Obsolete, or Unneeded Books, Equipment, and Supplies Policy.

Recommendation:

It is recommended the Board ratify the Tech to School Buyback Quote as presented.

19. Item: Ratification of [Courtyard by Marriott Event Sales Agreement](#)

Background:

Sage Oak Charter Schools requests the Board ratify the Courtyard by Marriott Event Sales Agreement to reserve a meeting space on December 15, 2025, for a Special Education department meeting. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Courtyard by Marriott Event Sales Agreement as presented.

20. Item: Ratification of [Raymond Intralogistics Solutions West Proposal](#)

Background:

Sage Oak Charter Schools requests the Board ratify the lift truck proposal from Raymond Intralogistics Solutions West for powered equipment, including a reach truck and pallet rider to

facilitate the movement of pallets in the new warehouse moving forward. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Raymond Intralogistics Solutions West Proposal as presented.

Coversheet

Consent - Education Services

Section:	XI. Consent Agenda
Item:	B. Consent - Education Services
Purpose:	
Submitted by:	
Related Material:	BUS Consent - Education Services_6.12.2025.pdf

SAGE OAK CHARTER SCHOOLS

Regular Meeting of the Board of Directors - June 12, 2025

BUS Consent Items - Education Services

Items listed under Consent are considered routine and will be approved/adopted by a single motion.

1. Item: Approval of [Sage Oak Charter Schools Parent and Student Handbook](#)

Background:

Sage Oak Charter Schools requests the Board approve the revised Parent and Student Handbook. The revisions enhance clarity, ensure compliance with current laws, and reflect updated school practices. Outdated sections removed or relocated. Language was clarified in key areas, including interventions, Section 504, foster and mobile youth, and student applications. New content includes a Multi-Tiered System of Supports (MTSS) section integrating intervention and counseling services, and a section on the California College Guidance Initiative, as required by Ed Code 60900.5(d). Policy updates address Transitional Kindergarten eligibility dates, excused absences for religious retreats and funerals (per AB 1503 and SB 350), and students' right to carry fentanyl test strips under Ed Code 49414.6. The Title IX notice was updated to reflect current contacts, and technology and assessment sections were revised to align with current practices, including the addition of a reading difficulty screener.

Recommendation:

It is recommended the Board approve the Sage Oak Charter Schools Parent and Student Handbook as presented.

2. Item: Approval of [2025-2026 Sage Oak Charter Schools Title I School-Parent/Guardian Compact](#)

Background:

Sage Oak Charter Schools requests Board approve the annual updates to the 2025–2026 Title I School-Parent/Guardian Compact. As required, the compact was reviewed and approved by Title I families and the Parent Advisory Committee on May 1, 2025. The only update was to reflect the effective date for the 2025–2026 school year; no other changes were made.

Recommendation:

It is recommended the Board approve the Sage Oak Charter Schools Title I School-Parent/Guardian Compact as presented.

3. Item: Approval of [2025-2026 Sacramento One-Day Field Trip, Grades 8-12](#)

Background:

Sage Oak Charter Schools requests the Board approve the Sacramento one-day field trip for the 2025-2026 school year for grades 8-12. The expense is budgeted in student instructional funds; therefore, there will be no additional fiscal impact.

Recommendation:

It is recommended the Board approve the Sacramento One-Day Field Trip for the 2025-2026 school year as presented.

4. Item: Approval of [2025-2026 Boston/Philadelphia Overnight Field Trip, Grades 9-12](#)

Background:

Sage Oak Charter Schools requests the Board approve the Boston/Philadelphia overnight field trip for the 2025-2026 school year for grades 9-12. The expense is budgeted in student instructional

funds; therefore, there will be no additional fiscal impact.

Recommendation:

It is recommended the Board approve the Boston/Philadelphia overnight field trip for the 2025-2026 school year as presented.

5. Item: Ratification of [Instructure, Inc. Order Form, Canvas](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the service renewal agreement for Instructure for the 2025-2026 school year. The service outlined in this agreement from Instructure is called Canvas, which is the learning management system used by Sage Oak Charter Schools for students and also for staff. This service provides a digital platform for instructors to organize educational materials that can be accessed by students and staff across various device platforms. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Instructure, Inc. Order Form for Canvas as presented.

6. Item: Ratification of [Instructure, Inc. Order Form, Mastery Connect](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the Instructure, Inc. Order Form to renew Mastery Connect, a data-based platform used by the Virtual Learning Program to deliver formative, standards-based assessments. As an Instructure product, it integrates seamlessly with Canvas. Due to its success, we are expanding its use schoolwide. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Instructure, Inc. Order Form for Mastery Connect as presented

7. Item: Ratification of Renaissance Learning, Inc., Quotes [#Q-187725](#) & [#Q-197048](#) (Renewal)

Background:

Sage Oak Charter Schools requests the Board ratify the service order with Renaissance Learning, Inc. for Nearpod, an instructional platform that supports student engagement and real-time formative assessment in virtual learning environments. Nearpod enables teachers to monitor participation, review student responses, and adjust instruction based on data. The platform also includes standards-aligned content to support efficient lesson planning. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

Recommendation:

It is recommended the Board ratify the Renaissance Learning, Inc. Quotes as presented.

Coversheet

Consent - Human Resources

Section:	XI. Consent Agenda
Item:	C. Consent - Human Resources
Purpose:	
Submitted by:	
Related Material:	BUS Consent - Human Resources_6.12.2025.pdf

SAGE OAK CHARTER SCHOOLS

Regular Meeting of the Board of Directors - June 12, 2025

BUS Consent Items - Human Resources

Items listed under Consent are considered routine and will be approved/adopted by a single motion.

1. Item: Approval of Certificated Personnel Report
2. Item: Approval of Classified Personnel Report
3. Item: Approval of Job Descriptions

Background:

Job descriptions are critical to the successful personnel operations of the school. They provide structure in areas such as recruitment, onboarding, determining reasonable accommodations, performance evaluation, succession planning, staff development, and compensation analysis. Job descriptions are routinely revised to remove antiquated wording, reflect the current duties of the positions, and align the minimum qualifications, knowledge, and abilities to the duties. New job descriptions are developed based on the school's staffing plans and identified support needs.

New:

[Operations and Accountability Specialist JD](#)
[Senior Administrator, Policy and Legislative Affairs JD](#)
[Parent Support Specialist JD](#)
[Senior Specialist, Payroll JD](#)

Revised:

[Alternate ELPAC Examiner SJD](#)
[Assessment Support JD](#)
[ELPAC Examiner SJD](#)
[Extensive Support Needs Teacher JD](#)
[High School Assistant Principal JD](#)
[504 & SST Coordinator JD](#)
[Student Services Coordinator JD](#)
[ASB Advisor JD](#)
[Paraprofessional JD \(VLA\)](#)
[Assistant Director of Accountability](#)
[Assistant Director of Special Education](#)
[Assistant Director of Student Services](#)
[Senior Director of Fiscal Services](#)
[Senior Director of Special Education](#)
[Senior Director of Outreach and Development](#)
[Director of Human Resources, Talent and Engagement](#)
[Director of Information Technology](#)
[Director of Operations & Accountability](#)
[Director of Student Services](#)
[Director of Personalized Learning/Principal](#)
[Director of Secondary Education/Principal](#)
[Director of Virtual Learning/Principal](#)
[Superintendent of Schools](#)

Recommendation:

It is recommended the Board approve the job description(s) and revisions as presented.

4. Item: Approval of [2025-2026 Sage Oak Charter Schools Employee Handbook Revisions](#)

Background:

Sage Oak Charter Schools requests the Board approve the revised 2025–2026 Employee Handbook. Updates reflect changes in California law and school operations. Key revisions include expanded definitions of protected classes under the Fair Employment and Housing Act, updated guidance on physical contact referring to the Professional Boundaries Policy, and a new section on representing the school at external events. Operational changes include setting the TK Virtual Learning Teacher student base at 20, updating the board-approved health benefit contribution table, and revising the *Paid Sick Leave* and *Jury Duty* sections to align with current labor codes. A new *Voting Leave* section was added outlining employees' rights to paid time off for voting.

Recommendation:

It is recommended the Board approve the 2025-2026 Sage Oak Charter Schools Employee Handbook Revisions as presented.

5. Item: Approval of [Sage Oak Charter Schools Comprehensive School Safety Plan \(CSSP\) Revisions](#)

Background:

Sage Oak Charter Schools requests the Board approve the revisions to the Comprehensive School Safety Plan (CSSP) to align with the requirements of Senate Bill (SB) 153. A new section has been added introducing Sage Oak's Instructional Continuity Plan (ICP), which outlines how instruction will continue during emergencies or natural disasters. As a virtual and independent study school, Sage Oak is already well-equipped for instructional continuity. The ICP builds on the existing Board-approved Independent Study Policy and includes additional details on communication protocols, remote instructional access, and SB 153 compliance.

Recommendation:

It is recommended the Board approve the Sage Oak Charter Schools Comprehensive School Safety Plan (CSSP) Revisions as presented.

6. Item: Approval of [2025-2026 11-Month Certificated Employee Work Year Calendars](#)

Background:

Sage Oak Charter Schools requests the Board approve the 2025–2026 work year calendars for 11-month certificated employees. These calendars clearly outline school closures, non-work days, and total work days.

Recommendation:

It is recommended the Board approve the 2025-2026 11-month Certificated Employee Work Year Calendars as presented.

Coversheet

Consent - Policy Development

Section:	XI. Consent Agenda
Item:	D. Consent - Policy Development
Purpose:	
Submitted by:	
Related Material:	BUS Consent - Policy Development_6.12.2025.pdf

SAGE OAK CHARTER SCHOOLS

Regular Meeting of the Board of Directors - June 12, 2025

BUS Consent Items - Policy Development

Items listed under Consent are considered routine and will be approved/adopted by a single motion.

1. Item: Approval of Changes to Existing Board Policies Revised/Reviewed/Rescinded

Background:

1000 Series- Community Relations

[1020-SO Field Trip Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve the revised Field Trip Policy. The policy has been reorganized to improve clarity around financial responsibility, specifically by relocating the section on payment procedures for parents and siblings to the participation section. Additionally, language related to funding has been updated, in consultation with legal counsel, to clarify that all students shall have equal opportunity to participate in field trips. Staff titles have also been updated to reflect current roles.

[1025-SO Uniform Complaint Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Uniform Complaint Policy to reflect minor edits and one key personnel change of the designated compliance officer. Other revisions include formatting, minor wording changes, and improved consistency. The complaint form remains structurally the same, with updated contact details reflecting the new compliance officer.

[1035-SO Access to Public Records Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Access to Public Records Policy. The updates include language clarifying that employees will not be required to provide personal account passwords when responding to public records requests. SOCS may guide identifying and separating public records from personal communications to support compliance while protecting employee privacy, aligning with Government Code § 7923.600. Additionally, the policy now states that a Governor-declared state of emergency may qualify as an unusual circumstance for extending response times, aligning with SB 1034. No changes were made to the core procedures for responding to records requests.

3000 Series- Business/Non-Instructional

[3010-SO Fiscal Control Policy and Procedures](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Fiscal Control Policy and Procedures. The Authorization to Hire Policy (SO-3150) has been rescinded, and its language has been updated and incorporated into this policy. The title Director of Business Services was also revised to Assistant Superintendent of Business Services to reflect the current organizational structure. No changes were made to core fiscal procedures or internal controls.

[3015-SO Investment Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Investment Policy. The updates include clarifying language and formatting revisions. The policy is simplified to allow only two specific investment types: Business Banking U.S. End Of Day Money Market Mutual Fund Sweeps and short-term Certificates of Deposit (under 12 months). At the same time, since the

allowable investments were limited, the policy removed the "Investment and Fiduciary Standards" and "Financial Professionals' Compliance with Investment Policy" sections, which previously detailed standards of care, fiduciary duties, and compliance requirements for advisors, who are unneeded for the simple and limited allowable investments.

[3150-SO Authorization to Hire Policy \(Rescinded\)](#)

Sage Oak Charter Schools requests the Board approve rescinding the Authorization to Hire Policy because this information is now covered in the 3010-SO Fiscal Control Policy and Procedures.

5000 Series- Student Services

[5065-SO Enrollment Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Enrollment Policy. The 5120-SO Transitional Kindergarten/Kindergarten Policy is being rescinded, and the language has now been updated and added to this policy.

[5090-SO Harassment, Intimidation, Discrimination, and Bullying Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Harassment, Intimidation, Discrimination, and Bullying Policy to include neurodiversity among the list of actual or perceived protected characteristics. In 2025, state law was amended to require the inclusion of neurodiversity in CDE resources related to school-based discrimination, harassment, intimidation, and bullying.

[5120-SO Transitional Kindergarten/Kindergarten Enrollment Policy \(Rescinded\)](#)

Sage Oak Charter Schools requests the Board approve rescinding the Transitional Kindergarten/Kindergarten Policy, because this information is now covered in the 5065-SO Enrollment Policy.

6000 Series- Instruction

[6005-SO Parent and Family Engagement Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Parent and Family Engagement Policy. Updates include minor language and formatting changes for clarity and consistency, such as correcting the policy series title to *Instruction* (to align with the 6000 series), renaming "Community Partner surveys" to "Stakeholder surveys," spelling out "English Learner Advisory Committee," and standardizing terms and headings. The policy's structure, procedures, and core engagement strategies remain unchanged.

[6010-SO Independent Study Policy](#)

Sage Oak Charter Schools requests the Board review and approve the Independent Study Policy, noting that there have been no changes since the last approval on August 8, 2024.

[6015-SO Comprehensive Sexual Health Education Policy](#)

Sage Oak Charter Schools requests the Board review and approve the Comprehensive Sexual Health Education Policy, noting that there have been no changes since the last approval on June 15, 2023.

[6025-SO Section 504 Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Section 504 Policy. The updates include minor wording, formatting edits for clarity, and a title update for Theresa Tedesco, now listed as Director of Student Services. All procedures, rights, and legal protections under Section 504 remain unchanged from the prior version.

[6030-SO Education for Foster and Mobile Youth Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Education for Foster and Mobile Youth Policy. The update reflects a title change for Theresa Tedesco, now listed as Director of Student Services. All rights, procedures, and legal protections for foster and mobile youth remain unchanged from the previous version.

[6035-SO Mathematics Placement Policy](#)

Sage Oak Charter Schools requests the Board review and approve the Mathematics Placement Policy, noting that there have been no changes since the last approval on June 15, 2023.

[6040-SO Assessment Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Assessment Policy. A new section was added outlining the administration of the state-mandated Reading Difficulties Risk Screener (RDRS) for students in grades K-2. The updated policy also introduces the Physical Fitness Test (PFT) as a required assessment for students in grades 5, 7, and 9. The section on English Language Proficiency Assessments for California (ELPAC) was expanded to clearly define who is assessed, the two components of the assessment, and its purpose in tracking English language proficiency. Additionally, the opt-out policy was significantly clarified: legal references were added for CAASPP, CAA, and RDRS opt-outs, and specific criteria were outlined under which a parent may request to exclude a child from RDRS. It was also emphasized that parents may not opt their child out of the PFT, ELPAC, or any local assessments, including the Diagnostic, TK, or Supplementary Local Assessments. Minor formatting and language adjustments were made throughout the document to improve consistency and clarity.

[6075-SO Special Education Certificate of Completion](#)

Sage Oak Charter Schools requests the Board review and approve the Special Education Certificate of Completion Policy, noting that there have been no changes since the last approval on June 15, 2023.

[6095-SO Repeated Courses Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Repeated Courses Policy. The updated policy includes clearer language and new provisions to guide when and how students may repeat courses. Under the revised policy, students may retake any course in which they received an F with no limitations. For courses with a D grade, students may retake the course once; further retakes require administrative approval and must be based on new or expanded instruction. Additionally, if a course is repeated under special circumstances, it must align with the student's academic plan. The revisions reflect greater oversight and alignment with academic goals. The policy maintains that all attempts and grades remain on the transcript, the highest grade is used for GPA calculation, and repeated courses are labeled with "/r/".

[6115-SO Attendance, Support, and Involuntary Disenrollment Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Attendance, Support, and Involuntary Disenrollment Policy. The updates include minor language updates to clarify expectations and reinforce student support procedures. A brief rationale about the academic impacts of chronic absence was added to the introduction. The second student re-engagement section was revised to improve clarity, particularly around the student support meeting's role in connecting students with academic, health, and social service resources. Additionally, the policy removes the requirement for a doctor's note within 48 hours after a missed assessment session if 24-hour notice was not provided. No structural changes were made to the multi-step re-engagement process or the involuntary disenrollment hearing procedures.

[6120-SO Meeting Policy](#)

Sage Oak Charter Schools requests the Board review and approve the Meeting Policy, noting that there have been no changes since the last approval on June 15, 2023.

[6125-SO Report Card Policy](#)

Sage Oak Charter Schools requests the Board review and approve the Report Card Policy, noting that there have been no changes since the last approval on June 15, 2023.

[6150-SO Intervention Policy](#)

[Redline Version](#)

Sage Oak Charter Schools requests the Board approve revisions to the Intervention Policy. The updates include minor language and formatting revisions for clarity and consistency. There were no changes to the policy's structure, procedures, or tiered support framework.

Recommendation:

It is recommended the Board approve the changes to the Board policies, as presented.

Coversheet

(Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2024-2025 Annual Reports for Sage Oak Charter Schools

Section: XII. Business Services
Item: A. (Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2024-2025 Annual Reports for Sage Oak Charter Schools
Purpose: Vote

Submitted by:

Related Material:

Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Report_Sage Oak Charter School #1885_6.12.2025.pdf

Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Report_Sage Oak Charter School - Keppel #1886_6.12.2025.pdf

Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Report_Sage Oak Charter School - South #2051_6.12.2025.pdf

BACKGROUND:

Local Education Agencies (LEAs) are mandated to report on several factors related to the use of Proposition 28 funding. The mandated information for these reports includes the number of full-time equivalent teachers, classified personnel, teaching aides, the number of pupils served, and the number of school sites providing arts education programs. These reports must be approved by the governing board and submitted to the Arts and Music in Schools website portal.

RECOMMENDATION:

It is recommended the Board approve the Proposition 28 Arts and Music in Schools Funding, 2024-2025 Annual Reports as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Proposition 28: Arts and Music in Schools Funding

Annual Report

Fiscal Year 2024-25

Name: Sage Oak Charter

CDS Code: 3667736-0136069

Charter School Number: 1885

Allocation Year: 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

The Prop 28 Arts Education Program enriches education by providing comprehensive arts access. We have hired art paraprofessionals and credentialed teachers for both virtual and in-person instruction in fine arts, painting, sculpting, creative arts, drawing, coding, and computer science. This diverse curriculum fosters creativity, critical thinking, and technical skills. Our fine arts courses, including painting and sculpting, encourage students to explore various mediums and techniques. Drawing classes build fundamental skills, enhancing observational and interpretative abilities. The integration of coding and computer science introduces students to essential digital skills, blending creativity with technical expertise. Prop 28 emphasizes personalized learning, offering flexibility through virtual classes and immersive experiences through in-person instruction. This dual approach caters to different learning styles, ensuring all students can thrive. By investing in skilled teachers and a varied curriculum, the Prop 28 Arts Education Program inspires creative thinkers and innovators. We aim to create an inclusive, dynamic environment where students discover and develop their artistic talents. This program not only enhances artistic abilities but also contributes to overall academic and personal growth, making a lasting impact on students and the community.

2. Number of full-time equivalent teachers (certificated). 2.6

3. Number of full-time equivalent personnel (classified). 0.6

4. Number of full-time equivalent teaching aides. 0.0

5. Number of students served. 0

6. Number of school sites providing arts education. 3

Date of Approval by Governing Board/Body 6/12/2025 12:00:00 AM

Annual Report Data URL

<https://www.sageoak.education/compliance/>

Submission Date 5/19/2025 12:13:02 PM

Proposition 28: Arts and Music in Schools Funding

Annual Report

Fiscal Year 2024-25

Name: Sage Oak Charter School- Keppel

CDS Code: 1964642-0136127

Charter School Number: 1886

Allocation Year: 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

The Prop 28 Arts Education Program enriches education by providing comprehensive arts access. We have hired art paraprofessionals and credentialed teachers for both virtual and in-person instruction in fine arts, painting, sculpting, creative arts, drawing, coding, and computer science. This diverse curriculum fosters creativity, critical thinking, and technical skills. Our fine arts courses, including painting and sculpting, encourage students to explore various mediums and techniques. Drawing classes build fundamental skills, enhancing observational and interpretative abilities. The integration of coding and computer science introduces students to essential digital skills, blending creativity with technical expertise. Prop 28 emphasizes personalized learning, offering flexibility through virtual classes and immersive experiences through in-person instruction. This dual approach caters to different learning styles, ensuring all students can thrive. By investing in skilled teachers and a varied curriculum, the Prop 28 Arts Education Program inspires creative thinkers and innovators. We aim to create an inclusive, dynamic environment where students discover and develop their artistic talents. This program not only enhances artistic abilities but also contributes to overall academic and personal growth, making a lasting impact on students and the community.

2. Number of full-time equivalent teachers (certificated). 0.3

3. Number of full-time equivalent personnel (classified). 0.1

4. Number of full-time equivalent teaching aides. 0.0

5. Number of students served. 0

6. Number of school sites providing arts education. 3

Date of Approval by Governing Board/Body 6/12/2025 12:00:00 AM

Annual Report Data URL

<https://www.sageoak.education/compliance/>

Submission Date 5/19/2025 12:07:55 PM

Proposition 28: Arts and Music in Schools Funding

Annual Report

Fiscal Year 2024-25

Name: Sage Oak Charter - South
 CDS Code: 3775416-0139378
 Charter School Number: 2051
 Allocation Year: 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

The Prop 28 Arts Education Program enriches education by providing comprehensive arts access. We have hired art paraprofessionals and credentialed teachers for both virtual and in-person instruction in fine arts, painting, sculpting, creative arts, drawing, coding, and computer science. This diverse curriculum fosters creativity, critical thinking, and technical skills. Our fine arts courses, including painting and sculpting, encourage students to explore various mediums and techniques. Drawing classes build fundamental skills, enhancing observational and interpretative abilities. The integration of coding and computer science introduces students to essential digital skills, blending creativity with technical expertise. Prop 28 emphasizes personalized learning, offering flexibility through virtual classes and immersive experiences through in-person instruction. This dual approach caters to different learning styles, ensuring all students can thrive. By investing in skilled teachers and a varied curriculum, the Prop 28 Arts Education Program inspires creative thinkers and innovators. We aim to create an inclusive, dynamic environment where students discover and develop their artistic talents. This program not only enhances artistic abilities but also contributes to overall academic and personal growth, making a lasting impact on students and the community.

2. Number of full-time equivalent teachers (certificated). 0.3

3. Number of full-time equivalent personnel (classified). 0.1

4. Number of full-time equivalent teaching aides. 0.0

5. Number of students served. 0

6. Number of school sites providing arts education. 3

Date of Approval by Governing Board/Body 6/12/2025 12:00:00 AM

Annual Report Data URL

<https://www.sageoak.education/compliance/>

Submission Date 5/19/2025 12:09:22 PM

Coversheet

(Action) Approval of Expenditure Plan for the Arts, Music, & Instructional Materials Block Grant (AMIM)

Section: XII. Business Services

Item: B. (Action) Approval of Expenditure Plan for the Arts, Music, & Instructional Materials Block Grant (AMIM)

Purpose: Vote

Submitted by:

Related Material:

Expenditure Plan for the Arts, Music, & Instructional Materials Block Grant (AMIM)_6.12.2025.pdf

RECOMMENDATION:

It is recommended the Board approve the expenditure plan for the Arts, Music, & Instructional Materials Block Grant (AMIM) as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Sage Oak Charter Schools

Arts, Music, and Instructional Materials (AMIM) Discretionary Block Grant

Expenditure Plan – For Public Hearing and Board Adoption

Board Adoption: June 12, 2025

Funds Available Through: June 30, 2026

Purpose of the Grant

Sage Oak Charter Schools have been allocated \$2,429,837 through the CDE's AMIM Discretionary Block Grant. This one-time funding supports instructional resources, staff development, operational support, and instructional innovation aligned with Sage Oak's 2024–27 Strategic Plan and Local Control and Accountability Plan (LCAP) goals.

Total Allocation by Charter School

Charter School	AMIM Allocation
Sage Oak Charter School	\$1,985,531
Sage Oak Charter – South	\$262,796
Sage Oak Charter – Keppel	\$181,510
Total	\$2,429,837

Planned AMIM Expenditures by Category

Expenditure Category	Amount
Instructional Materials	\$1,319,837
Operational Costs	\$445,000
Professional Development	\$665,000
Total Proposed Spending	\$2,429,837

Expenditure Detail

Instructional Materials (\$1,319,837)

- Mastery Connect, Hapara, Cidi Labs, Google Workspace Plus
- Pali Institute and Sacramento field trips
- AI instructional agent development
- Sage Oak Select Lending Library

Operational Costs (\$445,000)

- FSA expansion per employee from \$300 to \$750 annually.
- Employee Evaluation Software
- VLA paraprofessionals (7)
- Parent Support Specialist
- Oakschool "Parents as Paras"

- RCOE data consultation
- College/career counselor training

Professional Development (\$665,000)

- Teacher conferences (DLAC, LRP, AVID)
- Professional development expansion
- August Summit lodging support

LCAP Goal Alignment Crosswalk

Expenditure Item	Category	LCAP Goal(s)
Mastery Connect, Hapara	Instructional Materials	Goal 1: Academic Achievement
Lending Library (core content)	Instructional Materials	Goal 1
Pali, Sacramento Field Trips	Instructional Materials	Goal 2: Student Engagement
AI Agent R&D	Instructional Materials	Goal 1
HR Software, Parent Support, VLA Paras	Operational Costs	Goal 3: Systems & Staffing
Oakschool 'Parents as Paras'	Operational Costs	Goal 2 & 3
FSA, RCOE, Counselor Training	Operational Costs	Goal 1 & 3
Conferences, Summit, PD Expansion	Professional Development	Goal 3

SACS Code for Accounting: 6762

Coversheet

(Action) Approval of Sage Intacct Multi-Year Proposal (Renewal)

Section: XII. Business Services
Item: C. (Action) Approval of Sage Intacct Multi-Year Proposal (Renewal)
Purpose: Vote
Submitted by:
Related Material: Sage Intacct Multi-Year Proposal_6.12.2025.pdf

BACKGROUND:

Sage Intacct is an online accounting platform that offers financial management tools used by Business Services to manage the financial reporting duties of the organization.

RECOMMENDATION:

It is recommended the Board approve the proposal for the Sage Intacct Financial Management 3-year subscription renewal for the term 7/1/25-6/30/28, as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).



Ryan Cook
Sage Intacct, Inc.
300 Park Ave, Floor Suite 1400
San Jose, CA 95110
(408) 878-0900

Date: 01-Apr-2025
Offer Expires: 31-May-2025
Quote #: Q-725758

Renewal Order Schedule

Prepared For:
Name: Tim O'Brien
Company: Sage Oak Charter Schools
Address: 1473 Ford Street, Suite 105
Redlands, CA 92373
Phone: (888) 435-4445
Email: tobrien@sageoak.education

Bill To:
Name: Tim O'Brien
Company: Sage Oak Charter Schools
Address: 1473 Ford Street, Suite 105
Redlands, CA 92373
Phone: (888) 435-4445
Email: tobrien@sageoak.education

Subscription Period Length: 36 (months)

Billing Period: 01-Jul-2025 through 30-Jun-2026

Subscription Invoicing: Annual subscription fees begin on the start date of your paid subscription period, with such fees invoiced annually at the beginning of each billing period.

Subscription Payment Terms: Net 30 from date of invoice.

Products

Sage Intacct Services

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage for Nonprofits - Premium	Sage for Nonprofits - Premium includes the following: General Ledger, Cash Management, Purchase Order, Order Entry, Accounts Receivable, Accounts Payable, the User Defined Dimensions pack, Basic Project Tracking, Basic Time and Expenses, Core Reporting and Dashboards, Electronic Payments, Multi-Entity Insight, Budget Reporting, Customization Services, Standard Platform Services, a Support Package, Sage Intacct Planning - License, Sage Intacct Planning Integration, Interactive Visual Explorer - Team, Sage Intacct Interactive Custom Report Writer, Spend Management, Dynamic Allocations, Sage Fixed Assets Management Tier 1 - up to 250 Fixed Assets, AP Bill Automation - up to 50 Invoices / Month, a Performance Tier for Sage Intacct, Five (5) Business Users, Four (4) Additional Entities, One (1) Sage Intacct Planning - Creator, One (1) Employee User Ten (10) Pack, and Sage Intacct Learning Membership.	1.00	53,500.00	10,950.00	42,550.01
Essentials Support	Essentials Support is included as part of the Sage Intacct Financials subscription for all direct customers. Support hours are Monday to Friday, 6am to 6pm (Sage local time). For P1 cases, support is available after-hours and during local holidays. Support may be accessed online or by phone for two (2) Designated Support Users; those users will provide first level support to Company's other users. All submitted cases will receive an acknowledgement through case comments, email notification, or phone call as follows: P1, within 1 business hour; P2, within 4 business hours; and P3, within 8 business hours. Company may purchase three (3) additional Designated Support Users.	1.00	0.00	0.00	0.00
Sage Intacct API Performance Tier 1	API transactions for modules of the Sage Intacct Services, FinTech partners that we recommend to you, and Third-Party Services that we resell to you on our Order Schedules are included at no additional cost. Under Performance Tier 1 for Sage Intacct, API transactions for any custom integrations, ETL integrations with our Marketplace Partners, and partners that exit our Marketplace Partner program require a Web Services - Developer License and are also included at no additional cost until the number of API transactions exceed 100,000 API transactions per month. Monthly overage fees will apply if you exceed this use. You may upgrade to a higher tier at any time, but once you upgrade you may not downgrade to a lower tier until the next annual subscription period.	1.00	0.00	0.00	0.00
Sage Intacct Buy With Confidence Program	The Sage Intacct Buy With Confidence program includes guaranteed system uptime and disaster recovery for the Sage Intacct Services. Details of the Buy With Confidence program, including the specific Sage Intacct Services in scope and our service level commitments, are available at www.sage.com/us/legal/sage-intacct/sla/ .	1.00	0.00	0.00	0.00
User License - Business User	Users with unlimited access rights to all applications. Can be restricted based on permissions assigned by an Administrator.	5.00	3,660.00	0.00	18,300.00

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct Web Services - Developer License	This license gives you the right to develop applications that access Sage Intacct's public Web Services connections, allowing customers and partners to create, update, and delete records within Sage Intacct via an API interface rather than through the application. Includes one (1) development environment. This license is required for any development relating to Sage Intacct's Web Services connections, whether by a third-party or for a company's internal use case.	1.00	2,400.00	0.00	2,400.00
Sage Intacct Services Total:					USD 63,250.01

Sage Intacct Planning

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct Planning - Contributor	Includes the ability to edit and view budgets with security based on permissions set by the creator user.	5.00	780.00	0.00	3,900.00
Sage Intacct Planning Total:					USD 3,900.00

One-Time and Other Charges

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct API Overage	If you conduct more monthly API transactions than the amount included in your performance tier, then the following overage fees apply to each API transaction you conduct over those limits. The overage fees for API transactions are calculated here per pack of 10 API transactions and will be billed on a monthly basis.	0.00	0.15		0.00
One-Time and Other Charges Total:					USD 0.00

Monthly Services

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
AP Bill Automation - Overage	If you exceed your usage based fees, then the following overage fees apply for that month.	0.00	0.50		0.00
Monthly Services Total:					USD 0.00

Grand Total: USD 67,150.01

TERMS:

This Order Schedule is subject to the Agreement between Sage Intacct, Inc. and Sage Oak Charter Schools with effective date 23-Mar-2023, inclusive of any subsequent modifications, including as set forth at <https://www.sageintacct.com/customer-terms-us/tos>. All terms not otherwise defined herein shall have the meaning ascribed to them in the Agreement. Prices shown above do not include any taxes that may apply.



Exhibit A

Additional Terms and Conditions

The following terms are added to, and in the event of a conflict prevail over, the Terms:

- By signing this Order Schedule, the Company authorizes Sage Intacct to access the Company's instance to provision the items purchased on this Order Schedule.
- During the subscription period of this Order Schedule, we may increase the pricing of your subscriptions one time annually by up to five percent (5%). We will provide you with at least 30 days' written notice of any such increase and such increase will only apply at the beginning of the next annual billing period (i.e., year 2 and year 3 of the subscription period of this Order Schedule).
- Sage Intacct Financial Management includes up to two hundred (200) bank account connections through bank feeds. Bank feeds provide electronic access to thousands of financial institutions for bank reconciliations and matching payments to invoices.
- AP Bill Automation overage payment terms: If your usage of AP Bill Automation exceeds the purchased volume, then overage charges will accrue based on the number of invoices processed above the purchased volume in a given month. Payment is due 30 days from the date of invoice.

DRAFT

Coversheet

(Action) Approval of 2025–2026 Consolidated Application and Reporting System (CARS)

Section: XII. Business Services
Item: D. (Action) Approval of 2025–2026 Consolidated Application and Reporting System (CARS)
Purpose: Vote
Submitted by:
Related Material:
CARS 2025-2026 Application & Certification_Sage Oak Charter School #1885_6.12.2025.pdf
CARS 2025-2026 Appllication & Certifications_Sage Oak Charter School - Keppel #1886_6.12.2025.pdf
CARS 2025-2026 Application & Certifications_Sage Oak Charter School - South #2051_6.12.2025.pdf

BACKGROUND:

Sage Oak Charter Schools requests the Board approve the 2025-2026 data collections for submission to the Consolidated Application and Reporting System (CARS). The data collection includes Certification of Assurances, Protected Prayer Certification, LCAP Federal Addendum Certification, Application for Funding, and Substitute System for Time Accounting.

RECOMMENDATION:

It is recommended the Board approve the 2025-2026 data collections for submission to the Consolidated Application and Reporting System (CARS) as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

California Department of Education**Consolidated Application**

Sage Oak Charter (36 67736 0136069)

Status: Certified

Saved by: Habib Tahmas

Date: 5/22/2025 9:26 AM

2025–26 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at <https://www.cde.ca.gov/fg/aa/co/ca24assuranceestoc.asp>.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Signature	
Authorized Representative's Title	Sr. Director of Fiscal Services
Authorized Representative's Signature Date	05/22/2025

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Report Date:5/22/2025

R02

Page 1 of 5

Sage Oak Charter (36 67736 0136069)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2025 9:27 AM**2025–26 Protected Prayer Certification**

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Miguel Cordova, Title I Policy, Program, and Support Office, MCordova@cde.ca.gov, 916-319-0381

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Tim O'Brien
Authorized Representative's Title	Assistant Superintendent, Bus. Services
Authorized Representative's Signature Date	05/19/2025
Comment If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

2025–26 LCAP Federal Addendum Certification**CDE Program Contact:**Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233**Initial Application**

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/18/2025
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director, Fiscal Services

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

2025–26 Application for Funding**CDE Program Contact:**Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297**Local Governing Board Approval**

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes
---	-----

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes
---	-----

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	No
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Sage Oak Charter (36 67736 0136069)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2025 9:27 AM**2025–26 Substitute System for Time Accounting**

This certification may be used by auditors and by California Department of Education (CDE) oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:

Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the CDE web site at <https://www.cde.ca.gov/fg/ac/sa/>.

2025–26 Request for authorization	Yes
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	There are no known deficiencies or known challenges with implementing a substitute system.

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Report Date:5/22/2025

R02

Page 5 of 5

California Department of Education**Consolidated Application**

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Certified
 Saved by: Habib Tahmas
 Date: 5/22/2025 9:33 AM

2025–26 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at <https://www.cde.ca.gov/fg/aa/co/ca24assurancestoc.asp>.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Signature	
Authorized Representative's Title	Sr. Director of Fiscal Services
Authorized Representative's Signature Date	05/22/2025

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Report Date:5/22/2025

R02

Page 1 of 5

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2025 9:33 AM**2025–26 Protected Prayer Certification**

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Miguel Cordova, Title I Policy, Program, and Support Office, MCordova@cde.ca.gov, 916-319-0381

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	habib Tahmas
Authorized Representative's Title	Sr. Director Fiscal Services
Authorized Representative's Signature Date	05/22/2025
Comment	
If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Draft
 Saved by: Jamie Houseworth
 Date: 5/20/2025 2:43 PM

2025–26 LCAP Federal Addendum Certification

CDE Program Contact:

Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233

Initial Application

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/18/2025
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director, Fiscal Services

Warning

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

California Department of Education**Consolidated Application**

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Draft
Saved by: Jamie Houseworth
Date: 5/20/2025 2:44 PM**2025–26 Application for Funding****CDE Program Contact:**Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297**Local Governing Board Approval**

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes
---	-----

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes
---	-----

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	No
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2025 9:33 AM**2025–26 Substitute System for Time Accounting**

This certification may be used by auditors and by California Department of Education (CDE) oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the CDE web site at <https://www.cde.ca.gov/fg/ac/sa/>.

2025–26 Request for authorization	Yes
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	There are no known deficiencies or known challenges with implementing a substitute system.

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Report Date:5/22/2025

R02

Page 5 of 5

Sage Oak Charter School - South (37 75416 0139378)

Status: Certified
 Saved by: Habib Tahmas
 Date: 5/22/2025 9:32 AM

2025–26 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at <https://www.cde.ca.gov/fg/aa/co/ca24assurancestoc.asp>.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Signature	
Authorized Representative's Title	Sr. Director of Fiscal Services
Authorized Representative's Signature Date	05/22/2025

Warning

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Report Date:5/22/2025

R02

Page 1 of 5

Sage Oak Charter School - South (37 75416 0139378)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2025 9:32 AM**2025–26 Protected Prayer Certification**

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Miguel Cordova, Title I Policy, Program, and Support Office, MCordova@cde.ca.gov, 916-319-0381

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director Fiscal Services
Authorized Representative's Signature Date	05/22/2025
Comment If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

2025–26 LCAP Federal Addendum Certification**CDE Program Contact:**Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233**Initial Application**

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/18/2025
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director, Fiscal Services

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

California Department of Education**Consolidated Application**

Sage Oak Charter School - South (37 75416 0139378)

Status: Draft
Saved by: Jamie Houseworth
Date: 5/20/2025 3:07 PM**2025–26 Application for Funding****CDE Program Contact:**Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297**Local Governing Board Approval**

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes
---	-----

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes
---	-----

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	No
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Sage Oak Charter School - South (37 75416 0139378)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2025 9:32 AM**2025–26 Substitute System for Time Accounting**

This certification may be used by auditors and by California Department of Education (CDE) oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the CDE web site at <https://www.cde.ca.gov/fg/ac/sa/>.

2025–26 Request for authorization	Yes
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	There are no known deficiencies or known challenges with implementing a substitute system.

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Report Date:5/22/2025

R02

Page 5 of 5

Coversheet

(Action) Approval of 2025-2026 Certificated Educator Salary Schedule Revisions

Section: XIII. Human Resources
Item: A. (Action) Approval of 2025-2026 Certificated Educator Salary Schedule Revisions
Purpose: Vote
Submitted by:
Related Material:
2025-2026 Sage Oak Charter Schools Certificated Educator Salary Schedule Revisions_6.12.2025.pdf
2025-2026 Sage Oak Charter Schools Certificated Educator Salary Schedule - Pending Approval_6.12.2025.pdf

BACKGROUND:

The revisions to the 2025–2026 Certificated Educator Salary Schedule expand eligibility for the advanced degree stipend. Beginning August 1, 2025, certificated educators in salary ranges 6 or 7, beyond the previously limited teaching roles, may qualify for a \$1,540 annual stipend if they hold a Master's or Ph.D. in any field. The stipend will continue to be prorated based on FTE and the portion of the year the employee is actively working. Eligibility is not automatic and will be evaluated by Human Resources based on date of hire. The expense was included as part of the 2025-2026 Strategic Budget Plan approved by the Board on March 13, 2025.

RECOMMENDATION:

It is recommended the Board approve the revisions to the 2025–2026 Certificated Educator Salary Schedule, expanding eligibility for the advanced degree stipend as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).



2025-2026 Certificated Educator Salary Schedule Revisions

June 12, 2025

ORIGINAL LANGUAGE APPROVED MARCH 2025

Advanced Degree Stipend: Certificated teachers in salary ranges 6 and 7 with a Master's degree or Doctor of Philosophy (Ph.D.) are eligible for an annual stipend of \$1,540 (\$140 per month while in active status)

- **Eligibility Requirements:** *The employee must serve in a 1.0 FTE position as a certificated PLT, PLT+, EA, VLT, M/M SPED teacher, M/S SPED teacher, or Art teacher to qualify. Official transcripts reflecting the degree conferral date must be submitted directly from the college or university to Sage Oak Charter Schools' Human Resources as verification.*

PROPOSED NEW LANGUAGE

Advanced Degree Stipend: Certificated staff may be eligible for an annual stipend of \$1,540 (paid over 11 months at \$140 per month while in active status) for holding a Master's degree or Ph.D. in any field.

Eligibility Requirements:

- 1) The staff member must be serving in a certificated position assigned to salary range 6 or 7.
- 2) Eligibility is determined by Human Resources based on role, hire date, and degree verification.
- 3) Official transcripts must be submitted directly from the college or university to Sage Oak Human Resources.
- 4) For Adapted PE Teacher, Educational Reporting Facilitator, Intervention Teacher, Reading Specialist, and SPED Academic Assessor roles, eligibility may apply only to those hired on or after August 1, 2025, as determined by Human Resources.

Stipend Calculation: The stipend is prorated based on FTE and the portion of the year the employee is actively working (e.g., a 0.40 FTE employee working the full year would receive 40% of the stipend; if working only part of the year, the amount is prorated accordingly).

Sage Oak Charter Schools Certificated Educator Salary Schedule																				
FISCAL YEAR 2025-2026																				
BOARD APPROVED: March 13, 2025 <i>(Revised: Pending Board Approval June 18, 2025)</i>																				
Appendix A-2																				
Range	STEP A	STEP B	STEP C	STEP D	STEP E	STEP F	STEP G	STEP H	STEP I	STEP J	STEP K	STEP L	STEP M	STEP N	STEP O	STEP P	STEP Q	STEP R	STEP S	STEP T
6	\$66,736	\$68,837	\$71,967	\$74,154	\$75,333	\$76,663	\$77,558	\$78,333	\$80,685	\$81,493	\$82,306	\$83,130	\$85,623	\$86,479	\$87,344	\$89,091	\$89,982	\$90,883	\$92,700	\$93,628
7	\$76,149	\$78,317	\$80,486	\$82,653	\$84,822	\$86,990	\$89,158	\$91,324	\$93,494	\$94,428	\$95,372	\$96,326	\$98,252	\$99,234	\$100,227	\$102,231	\$103,254	\$104,287	\$106,372	\$107,436

- Annual step advancement on the salary schedule occurs on July 1 (or August 1 for 11-month employees) in accordance with Sage Oak Charter Schools' salary advancement policy. Salary schedule adjustments may be made at any time at the discretion of the Board of Directors and are subject to approval as part of the annual fiscal plan.

ADDITIONAL STIPENDS/COMPENSATION (Certificated)

Advanced Degree Stipend: Certificated staff may be eligible for an annual stipend of \$1,540 (paid over 11 months at \$140 per month while in active status) for holding a Master's degree or Ph.D. in any field.

Advanced Degree Stipend Eligibility Requirements:

- 1) The staff member must be serving in a certificated position assigned to salary range 6 or 7.
- 2) Eligibility is determined by Human Resources based on role, hire date, and degree verification.
- 3) Official transcripts must be submitted directly from the college or university to Sage Oak Human Resources.
- 4) For Adapted PE Teacher, Educational Reporting Facilitator, Intervention Teacher, Reading Specialist, and SPED Academic Assessor roles, eligibility may apply only to those hired on or after August 1, 2025, as determined by Human Resources.

Advanced Degree Stipend Calculation: The stipend is prorated based on FTE and the portion of the year the employee is actively working (e.g., a 0.40 FTE employee working the full year would receive 40% of the stipend; if working only part of the year, the amount is prorated accordingly).

Additional Regular for Personalized Learning Teacher (PLT), Personalized Learning Teacher Plus (PLT+), Education Advisor (EA), and Special Education (SPED) Teacher positions: Staff in eligible roles may receive additional pay for each student exceeding their 1.0 FTE caseload from August through June. To qualify, teachers must serve students for a minimum number of days within a learning period. Compensation rates vary based on the employee's range and step. See table below for rates.

Teaching Position	STEP A	STEP B	STEP C	STEP D	STEP E	STEP F	STEP G	STEP H	STEP I	STEP J	STEP K	STEP L	STEP M	STEP N	STEP O	STEP P	STEP Q	STEP R	STEP S	STEP T
PLT	\$217	\$223	\$234	\$241	\$245	\$249	\$252	\$254	\$262	\$265	\$267	\$270	\$278	\$281	\$284	\$289	\$292	\$295	\$301	\$304
PLT+	\$288	\$297	\$305	\$313	\$321	\$330	\$338	\$346	\$354	\$358	\$361	\$365	\$372	\$376	\$380	\$387	\$391	\$395	\$403	\$407
EA	\$346	\$356	\$366	\$376	\$386	\$395	\$405	\$415	\$425	\$429	\$434	\$438	\$447	\$451	\$456	\$465	\$469	\$474	\$484	\$488
M/M SPED	\$266	\$274	\$281	\$289	\$297	\$304	\$312	\$319	\$327	\$330	\$333	\$337	\$344	\$347	\$350	\$357	\$361	\$365	\$372	\$376
M/S SPED	\$462	\$475	\$488	\$501	\$514	\$527	\$540	\$553	\$567	\$572	\$578	\$584	\$595	\$601	\$607	\$620	\$626	\$632	\$645	\$651

Additional Regular for Virtual Learning Teacher (VLT) position: Staff in eligible roles may receive additional pay for each student exceeding their 1.0 FTE caseload from August through June. To qualify, teachers must serve students for a minimum number of days within a learning period. Compensation rates vary based on the employee's range and step. See table below for rate.

VLT	\$267
-----	-------

Live Teaching Class Size Overage: Education Advisors (EAs) may receive additional compensation for teaching students beyond their 1.0 FTE caseload in live teaching classes from September through June. To qualify, EAs must teach students for a minimum number of days within a learning period. Compensation is based on the number of students exceeding the 1.0 FTE threshold in a given month. See table below for details.

Range of Students	Monthly	Additional Hrs.
110-144	\$400	1-3
145-179	\$600	4-6
180-214	\$800	7-9

Coversheet

(Action) Approval of 2025-2026 Sage Oak Charter Schools English Learner (EL) Master Plan, Presented by Lorinda Loughlin, Assessment Coordinator

Section: XIV. Operations and Accountability
Item: A. (Action) Approval of 2025-2026 Sage Oak Charter Schools English Learner (EL) Master Plan, Presented by Lorinda Loughlin, Assessment Coordinator
Purpose: Vote
Submitted by:
Related Material:
2025-2026 Sage Oak Charter Schools EL Master Plan_Presentation_6.12.2025.pdf
2025-2026 Sage Oak Charter Schools EL Master Plan_Summary of Changes_6.12.2025.pdf
2025-2026 Sage Oak Charter Schools EL Master Plan_6.12.2025.pdf
2025-2026 Sage Oak Charter Schools EL Master Plan_Redline_6.12.2025.pdf

BACKGROUND:

The English Learner (EL) Master Plan has been updated to align with current state guidelines, streamline processes, and incorporate new systems. Key updates include the addition of Ellevation as the primary platform for EL data tracking and communication, expanded explanations of assessments (e.g., ELPAC, Alternate ELPAC), and refined policies on student reclassification, especially for dually identified students with IEPs. Clarifications were added regarding legal compliance (e.g., no opt-out for ELPAC, mandatory English instruction), and language was adjusted to reflect updated procedures, terminology, and instructional mandates. Several procedural details were relocated to the Special Education manual to better align departmental responsibilities.

RECOMMENDATION:

It is recommended the Board approve the 2025-2026 English Learner (EL) Master Plan as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).



English Learner Master Plan Changes 2025/26





Reclassification of Dually Identified Students

- 1 Determine Eligibility
- 2 IEP Team Determination Reclassification Worksheet
- 3 Recommendation



English as the Language of Instruction

- 1 | California Education
Code Section 305
- 2 | Synchronous and/or asynchronous
instruction for all core academic
areas
- 3 | Opting out of this instruction is
not permitted



Assessment and Student Program Monitoring

- 1 | Ellevation Platform
- 2 | Improved ability to monitor all EL students
- 3 | Aligns with Goal #3 in our Strategic Plan



Thank You

English Learner (EL) Master Plan Changes for the 2025/2026 School Year**(Note: page numbers reference the redline version)**

Page	Change	Explanation
4	Updated the statistical data to reflect the school's current information to add 14 languages from the previous 12: "There are 14 different languages spoken by Sage Oak EL students"	Data was taken from current school enrollment.
4	Added the words to explain what Calpads is: "the California Longitudinal Pupil Achievement Data System (CALPADS) shall be used"	Only the abbreviation was listed here and not explained in detail.
5	Added specific applicable grade levels: "newly enrolled students in grades K-12 whose primary language is not English, as an initial assessment"	In California, Transitional Kindergarten (TK) students are exempt from the Initial ELPAC (English Language Proficiency Assessments of California) due to AB 2268, which took effect in June 2024.
5	Added the following to reflect that there is not an opt-out option for the ELPAC for eligible students: "There is no opt-out option for the ELPAC for eligible students. State and federal laws require that all English learner students be assessed annually on the state English language proficiency assessment until reclassified as fluent English proficient."	California Education Code (EC 313) and federal law (Every Student Succeeds Act, ESSA) mandate that all students whose primary language is not English be assessed for English language proficiency.
5	Removed "and/or through US mail" in the process of how parents are informed of test results.	Sage Oak notifies parents via the parent portal, as well as with an email notification.
5	Changed how student's test results are uploaded by adding Ellevation:	Sage Oak purchased the Ellevation platform to help streamline all EL data.

	"as well as recorded in our database, Ellevation, and on the English Language Master Tracking Sheet."	
6	Updated the dates for the Initial English Language Proficiency Assessments for California (ELPAC) window for the 2025/2026 school year to: "July 1, 2025 to June 30, 2026"	This year, the window opens on a different date.
6	Added "Alternate Initial ELPAC" to include any applicable student score reports that may have been administered that test: "Initial ELPAC and Alternate Initial ELPAC Student Score Reports"	The Alternate Initial ELPAC may also be administered if it is deemed appropriate for the student.
7	Updated a new website to reflect the accessibility for information about the ELPAC: "California Department of Education: Parent Guides to Understanding at https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp "	This website will reflect all new and relevant information for staff and parents in regards to the ELPAC.
7	Added "English Language Proficiency (ELP)" to include more details about what the ELPAC measures: "The Summative ELPAC is aligned with the 2012 California English Language Development Standards, measuring the English Language Proficiency (ELP) and how well a student is progressing with English development"	Including all details about what the ELPAC measures helps to inform that the ELP is used to determine a student's English proficiency level, inform their placement in EL programs, and ultimately decide if they are ready to be reclassified as fluent English proficient.
7	Added "the Alternate Summative ELPAC" to be included in one of the possibilities of tests administered: "The Summative ELPAC and the Summative Alternate ELPAC must be given annually"	The Alternate Summative ELPAC may also be administered if it is deemed appropriate for the student.

7	<p>Updated the Summative ELPAC window dates:</p> <p>“The Summative ELPAC administration window is open from February 1 through May 31.”</p>	The window for the Summative ELPAC date ends on May 31st this year.
8	<p>Added the words to explain what SBE is:</p> <p>“These ranges incorporate the performance level cut scores approved by the State Board of Education (SBE).”</p>	Only the abbreviation was listed here and not explained in detail.
9	<p>Added the explanations of the Alternate ELPAC levels and changed “students” to “English learners”:</p> <p><u>Level 3: Fluent English Proficient</u> English Learners at this level have sufficient English language proficiency (ELP). They may need occasional linguistic support to enable them to access adapted grade-level content in English.</p> <p><u>Level 2: Intermediate English Learner</u> English Learners at this level have moderate ELP. They may need frequent linguistic support to enable them to access adapted grade-level content in English.</p> <p><u>Level 3: Novice English Learner</u> English learners at this level have minimal ELP. They need substantial linguistic support to enable them to access adapted grade-level content in English.</p>	Specific details about what the levels indicate were not previously listed and to streamline the definitions..
9	<p>Added a more defined explanation to Criterion 4 to include age and established benchmark:</p> <p>“Evaluation of basic skills relative to the average performance of native English speakers of the same age, based on locally established empirical benchmarks”</p>	This is to better streamline the ordinance from the CDE and clarify that the LEAs establish the empirical range of performance in basic skills when setting the locally established criteria for reclassification.

10	<p>Added “Ellevation” to the sequence of updating a student’s language acquisition:</p> <p>“The language acquisition status of the student will be updated in the student information system, Ellevation, on the EL Master Tracking Spreadsheet, and ultimately in the state reporting system (CALPADS).”</p>	Sage Oak purchased the Ellevation platform to help streamline all EL data.
10	<p>Added the terminology of “dually identified”:</p> <p>“the ED requires that all ELs with disabilities, or dually identified students, participate in the state’s ELP assessment.”</p>	This term is used by the CDE in educational contexts to describe students who are both English Learners (ELs) and have been identified as having disabilities under the Individuals with Disabilities Education Act (IDEA).
11	<p>Added information about Domain Exemptions on the ELPAC that can be determined by the IEP Team:</p> <p>“Students with disabilities who cannot take one or more domains of the ELPAC with approved accessibility resources are eligible for a domain exemption. A domain exemption may be used if an English learner has a disability that precludes assessment of the student in one or more domains of the English language proficiency assessment such that there are no appropriate accommodations for the affected domain(s). This use of a domain exemption(s) must be identified in the student’s individualized educational program (IEP) or Section 504 plan. For a student to be assigned an Overall score, the student will need to be assessed in all domains to receive a student score report.”</p>	In certain cases, students with disabilities may be eligible for domain exemptions if the student has a disability that precludes meaningful participation in one or more of the Initial and Summative English Language Proficiency Assessments for California (ELPAC) domains (i.e., Speaking, Listening, Reading, and Writing) (34 CFR Section 200.6[h][4][ii]).
11	<p>Removed “and other professionals, such as speech-language pathologists, who understand how to differentiate between English proficiency development and</p>	This phrase is not needed because the student may not have Speech-language pathologists. The IEP team will consist of the

	a disability”	appropriate professionals needed by the individual student based on the specific IEP requirement.
11	Removed “Ensuring that all ELs, including those with disabilities, participate in the annual state ELPAC assessment, with or without universal tools, designated supports, and accommodations or take the Alternate ELPAC, if necessary (ESSA Section 1119[b][7] and IDEA Section 612[a][16][A]). An IEP team cannot determine that a particular EL with a disability should not participate in the annual state ELP assessment (ED, July 2014, FAQ #7).”	This section was repetitive and already explained previously in the prior section.
12	Removed “annually” at the end of this statement to now read: “Students whose initial Home Language Survey indicates that a language other than English is spoken will be assessed on the ELPAC test within the first 30 days of school”	The Initial ELPAC is only given once when a student is newly enrolled in a CA school.
12	Updated the statement: “If a student is slated to take the ELPAC test, who also would qualify for the CAA, the Special Education Director will be notified so that we can evaluate the need for the Alternate ELPAC.” New statement: “If the IEP team determines that a student will participate in the California Alternate Assessment (CAA), the team must also determine whether the student qualifies for the Alternate ELPAC.”	This determination is decided during the IEP meeting with the IEP team and can be concluded at that time, as the Director does not need to be notified.
12-13	Removed the sections about the “Needs of English Learners” and “Writing Linguistically Appropriate Goals and Benchmarks”	This is a procedural based directive that will be placed in the Sped department’s teacher manual. The SPED department is going to add a new section to the SPED manual next year for ELs to ensure that this type of information is placed accordingly

		and any necessary changes are based on the state IEP forms.
14	<p>Changed the title of the section to add “Dually Identified Students”:</p> <p>“Special Education EL Reclassification for Dually Identified Students”</p>	<p>This term is used by the CDE in educational contexts to describe students who are both English Learners (ELs) and have been identified as having disabilities under the Individuals with Disabilities Education Act (IDEA).</p>
14	<p>Added a section to address situations where an IEP team can make a determination to reclassify a dually identified student to fluent if it is determined that the disability interferes with the student’s ability to demonstrate English fluency.</p> <p>“The IEP team may be designated to make reclassification decisions as long as team members utilize state reclassification criteria and apply those criteria to students with disabilities according to state guidelines. IEP teams may not modify Criterion 1 for reclassification, which requires meeting the SBE-adopted Overall PL 4 on the Summative ELPAC or PL 3 on the Summative Alternate ELPAC. This allows for all students to be held to a consistent and rigorous standard in demonstrating ELP in order to be exited from EL services.”</p>	<p>When a disability might interfere with valid testing or language output, the IEP team must determine whether the student has acquired sufficient English proficiency for meaningful participation in the general education curriculum without specialized EL services. The decision must still follow state guidelines and reclassification criteria, and cannot be made arbitrarily.</p>
14	<p>Removed a section that is not applicable to the determination of the reclassification of dually identified students: “The Administrative Designee and/or Case Manager should include the rationale for reclassification. Avoid:</p> <ul style="list-style-type: none"> • Focusing on family history. Instead, focus on assessment results and the impact of the disability. • Including parents’ wishes for reclassification or opinion on the validity of ELPAC scores or current 	<p>When a disability might interfere with valid testing or language output, the IEP team must determine whether the student has acquired sufficient English proficiency for meaningful participation based on the goals set forth on the IEP and not situational circumstances. Taking this out better streamlines the process that will be determined via the IEP Team</p>

	<p>English learner status. Instead, focus on the needs of the child.</p> <ul style="list-style-type: none"> • Basing recommendation for changing EL status on the belief of the parent(s) or team members that the EL status or Home Language Survey was erroneous to begin with and, therefore the student should never have been classified as EL. This is a matter outside of the scope of the IEP team and cannot be the basis for the team's recommendation for reclassification." 	Reclassification Determination Worksheet has been created.
15	<p>Updated the reclassification section to include using the "the IEP Team Reclassification Determination Worksheet" and clarify the process as to who must be present in the decision and what steps are taken if the reclassification is decided upon:</p> <p>"If the recommendation for reclassification is taking place as part of the student's initial IEP or annual review, then the IEP Team Reclassification Determination Worksheet is to be completed, along with all other pages of the IEP to reflect the recommendation that the student is to be reclassified as RFEP (Reclassified Fluent English Proficient). If the recommendation for reclassification occurs between annual reviews, then in addition to completing the IEP Team Reclassification Determination Worksheet, an <i>IEP Amendment</i> meeting and form must also be completed. Because this is an IEP team recommendation, the parents, EL Assessment Coordinator, and all applicable staff should be a part of the reclassification meeting and decision. If the team decides to reclassify the student as RFEP, the EL Assessment Coordinator will include a copy of the IEP Team Reclassification Determination Worksheet in the student's file. The EL Assessment Coordinator will then follow the regular reclassification process to update the student's English Language Acquisition Status and notify all parties involved of the reclassification.</p>	The IEP Team Reclassification Determination Worksheet has been created to ensure that the team makes concrete and substantial decisions in the process of determining the possibility of reclassification. All decisions are based on the CDE's Guidance on Reclassification for Dually Identified Students.

	If the reclassification is not agreed upon, the IEP team must ensure that the IEP continues to address the needs of the student who remains classified as an English learning student."	
17	<p>Added new section "English as the Language of Instruction":</p> <p>"In accordance with California Education Code Section 305, all students in California public schools, including those enrolled in independent study programs, must be taught in English for all core academic areas. This is to include, but not limited to, English Language Arts, Math, History, and Science. This requirement ensures that all students, including English Learners, receive equitable access to instruction that promotes English language proficiency and academic success.</p> <p>To meet this requirement:</p> <ul style="list-style-type: none"> • Instruction in all subjects will be provided in English, including synchronous and asynchronous components of the independent study program. • Participation in synchronous and/or asynchronous instruction for all core academic areas in English is mandatory for all English Learner students, regardless of their English Learner status or participation in an ELD program, as this is essential for meaningful interaction and mastery of academic content. • Opting out of this instruction is not permitted, as it is integral to ensuring compliance with state law and the successful implementation of Sage Oak's academic program. <p>This policy ensures that Sage Oak Charter Schools uphold the legal and educational responsibilities to all students, fostering an environment where English language acquisition and academic achievement are prioritized."</p>	In accordance with California Education Code Section 305, all students in California public schools, including those enrolled in independent study programs, must be taught in English.

22	<p>Updated the section in "Professional Learning" to include Ellevation Database Training and remove training on EL Master Tracking Spreadsheet and EL Cumulative file training:</p> <p>"Staff development opportunities include, but are not limited to, the following:</p> <ul style="list-style-type: none"> • ELD Standards • ELPAC assessment and identification levels • ELD strategies and instruction • SDAIE strategies and instruction • Differentiated instruction • Ellevation Database Training • Shared Best Practices" 	Sage Oak purchased the Ellevation platform to help streamline all EL data.
27	<p>Removed "student's individual ELF card" from this statement:</p> <p>"The use of multiple measures, the disaggregating of student achievement data, and the regular reporting of student achievement data are integral components of the Charter assessment and reporting process and are recorded in the Ellevation platform."</p>	Sage Oak purchased the Ellevation platform to help streamline all EL data and no longer retains ELF cards.
29	<p>Updated "student's individual ELF card" with "Ellevation platform":</p> <p>"This monitoring of RFEP students is recorded in the Ellevation platform."</p>	Sage Oak purchased the Ellevation platform to help streamline all EL data.

Sage Oak Charter Schools

English Learner Master Plan

2025-2026



Presented by: Sage Oak Charter Schools
Board Approved June 12, 2025

Commitment and Purpose

Mission

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

Vision

Sage Oak students embrace their unique potential and are inspired to positively impact their communities.

Goals and Objectives

The Sage Oak English Learner Master Plan serves as a guide and gives an overview of the programs and resources provided for our English learners. The plan is centered around our vision, core beliefs, and goals for all students in our schools and affirms our commitment to each English learner as an individual by honoring their diversity and accelerating their English language proficiency while preparing them for the rigors of college, future careers, and becoming a productive and engaged global citizen.

The English Learner Master Plan provides a clear statement of policies related to the development, implementation, and evaluation of English learner programs and services that are required by all state and federal guidelines. These policies are based on current resources and initiatives related to the 2012 CA ELD Standards, the 2014 English Language Arts (ELA)/English Language Development (ELD) Framework and the California English Learner Roadmap and are in place in order to:

- Ensure that English learners will achieve English language proficiency as quickly as possible.
- Support the academic success of English learners by consistently providing high-quality services designed to meet their academic and linguistic needs.
- Develop cross-cultural awareness and appreciation of one's own culture and language, encourage bilingualism, and enhance the positive self-esteem of English learners.
- Embrace and encourage parent and community involvement in meeting the needs of English learners.
- Provide staff and parent training in the implementation of effective instructional programs and teaching strategies for English learners.
- Providing a process for monitoring the effectiveness of the program.

Guiding Principles of the California English Learner Roadmap

The California English Learner Roadmap will guide Sage Oak to continuous improvement of the EL program over time. The Roadmap emphasizes four principles and approaches to teaching and learning that result in a more powerful, twenty-first-century education for all English learners.

Principle One: Assets-Oriented and Needs-Responsive Schools

Pre-schools and schools are responsive to different English learner (EL) strengths, needs, and identities and support the socio-emotional health and development of English learners. Programs value and build upon the cultural and linguistic assets students bring to their education in safe and affirming school climates. Educators value and build strong family, community, and school partnerships.

Principle Two: Intellectual Quality of Instruction and Meaningful Access

English learners engage in intellectually rich, developmentally appropriate learning experiences that foster high levels of English proficiency. These experiences integrate language development, literacy, and content learning, as well as provide access for comprehension and participation through native language instruction and scaffolding. English learners have meaningful access to a full standards-based and relevant curriculum and the opportunity to develop proficiency in English and other languages.

Principle Three: System Conditions that Support Effectiveness

Each level of the school system (state, county, district, school, pre-school) has leaders and educators who are knowledgeable of and responsive to the strengths and needs of English learners and their communities and who utilize valid assessment and other data systems that inform instruction and continuous improvement. Each level of the system provides resources and tiered support to ensure strong programs and build the capacity of teachers and staff to leverage the strengths and meet the needs of English learners.

Principle Four: Alignment and Articulation Within and Across Systems

English learners experience a coherent, articulated, and aligned set of practices and pathways across grade levels and educational segments, beginning with a strong foundation in early childhood and appropriate identification of strengths and needs and continuing through to reclassification, graduation, higher education, and career opportunities. These pathways foster the skills, language(s), literacy, and knowledge students need for college- and career-readiness and participation in a global, diverse, multilingual, twenty-first-century world through Integrated ELD.

For additional information, visit the [CDE English Learner Roadmap web page](#).

Sage Oak Charter Schools EL Population

Sage Oak Charter Schools serve a student population of TK through grade 12. Our English Learners make up approximately 2.2%. There are 14 different languages spoken by Sage Oak EL students, with most of the EL students' primary language being Spanish.

Responding to Diverse Learners

Identification of English Learner Students

Federal Law mandates that all students in K–12, upon first enrollment in a California public school, the Local Education Agency (LEA) uses a standardized procedure to determine a student's primary language.

Home Language Survey

This procedure begins with a home language survey (HLS), which is completed once by the parent or guardian at the time the student is initially enrolled in a California public school. The HLS is used as the primary screener to identify if the student uses a primary language other than English. If at least one of the first three questions on the HLS is answered with a language "other than English", the assessment process to determine English language fluency begins. This process includes testing the student's English proficiency with the state-adopted English language proficiency assessment, English Language Proficiency Assessments for California (ELPAC). The initial assessment will be administered within thirty (30) calendar days of enrollment. In cases where parents/guardians answer 'English' to all questions on the HLS, but educators notice the student using another language, this student may be assessed on the initial ELPAC so the school provides the child's civil right to access education. Parents and school personnel should work collaboratively to identify if the child is or is not an English learner.

The HLS should not be readministered yearly or readministered if a student enrolls in a new LEA. If the HLS is completed in error, the parent or guardian may make a request to change it prior to the assessment. However, once a student is identified as an EL on the basis of the results of the Initial ELPAC and the student has been administered the Summative ELPAC, changing the HLS will not change the student's identification. While cumulative student records are in transit for a student transferring from another California School District, the California Longitudinal Pupil Achievement Data System (CALPADS) shall be used to determine whether a student has a history of being an English Language Learner. If a student has a history of being an English Learner, the student will be given an annual Summative ELPAC assessment during the February 1st through May 31st test window.

ELPAC Assessment

For California's public school students, the English Language Proficiency Assessment for California (ELPAC) is the required state test for English Language Proficiency (ELP) that must be given to students whose primary language is not English, as determined by the HLS or teacher observation. State law (California Education Code [EC] sections 313 and 60810) and federal law (Titles I and III of the Every Student Succeeds Act [ESSA], the reauthorization of the Elementary and Secondary Education Act [ESEA]) require that LEAs administer a state test of English language proficiency (ELP) and develop an English Learner Progress Indicator (ELPI) for (1) newly enrolled students in grades K-12 whose primary language is not English, as an initial assessment; and (2) students who are English Learners (ELs) as a summative assessment. ELPAC results are not used to measure academic achievement. There is no opt-out option for the ELPAC for eligible students. State and federal laws require that all English learner students be assessed annually on the state English language proficiency assessment until reclassified as fluent English proficient.

Once tests are scored by the testing agency, individual student score reports (SSRs) are loaded directly to both the parent and student portals of the school's student information system from the Test Operation Management System. Once scores are received, parents will also be informed of test results within 30 calendar days from the first day of the current school year via email. If some or all SSRs are received after the last day of instruction for the school year, parents will receive the SSR within 15 working days at the start of the next school year. Parents/guardians are notified of results in writing in a language they can understand (or orally if they are unable to understand written communication). Parents will also be notified in any language of which 15% or more of the student population speaks in common. Additionally, each student's test results are uploaded to the charter's student information system, as well as recorded in our database, Ellevation, and on the English Language Master Tracking Sheet. When a student withdraws from Sage Oak Charter School, a list of the student's test results will be printed from the student information system and included in the student's requested cumulative file.

Initial ELPAC Assessment

The Initial ELPAC aims to identify students who are ELs or are initial fluent English proficient (IFEP). All students in kindergarten through grade twelve (K-12), ages three through twenty-one, whose primary language is a language other than English must take the Initial ELPAC within 30 calendar days after they are first enrolled in a California public school or 60 calendar days prior to instruction, but not before July 1, per ELPAC regulations.

The Initial ELPAC window is from July 1, 2025, to June 30, 2026. The Initial ELPAC measures the ELP in the four language domains of listening, speaking, reading, and writing and identifies students as beginning either fluent in English (IFEP) or an English Learner (Intermediate or Novice).

The Initial Alternate ELPAC is administered as an initial assessment to newly enrolled students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments and have a language other than English, as indicated on a home language survey

Initial ELPAC and Alternate Initial ELPAC Student Score Reports

The official score for the Initial ELPAC and the Alternate Initial ELPAC is produced once the LEA has entered and locked in the student's raw scores into the state assessment system. Individual student Initial ELPAC results include:

1. An Overall performance level and scale score which will indicate which of the three performance levels the student achieved: IFEP, Intermediate EL, and Novice EL.

Initial Fluent English Proficient (IFEP)

Students at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts.

Intermediate English Learner

Students at this level have somewhat developed to moderately developed oral (listening and speaking) and written (reading and writing) skills. This level captures a broad range of English learners, from those who can use English only to meet immediate communication needs to those who can, at times, use English to learn and communicate in meaningful ways on a range of topics and content areas.

Novice English Learner

Students at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts. They need substantial linguistic support to communicate on less familiar tasks and topics.

2. A performance level for each composite tested (Oral and Written Language) is well-developed, somewhat to moderately developed, and minimally developed.

The initial ELPAC results are used to identify ELs who need to develop their listening, speaking, reading, and writing skills in English. This information, used with other local assessments, assists LEAs and schools when making placement decisions for new students who are identified as ELs. The initial ELPAC results are also used to identify students who are IFEP and are able to participate in the regular (core) academic program without further English language support. More information for families and staff can be found at <https://www.caaspp-elpac.org> or the California Department of Education: Parent Guides to Understanding at <https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp>.

Summative ELPAC Assessment

The Summative ELPAC is given only to students who have previously been identified as English Learners based upon Initial ELPAC results. The Summative ELPAC is aligned with the 2012 California English Language Development Standards, measuring the English Language Proficiency (ELP) and how well a student is progressing with English development in each of the four domains: Listening, Speaking, Reading, and Writing.

The Summative Alternate ELPAC is a summative assessment for EL students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments. This assessment must be administered annually to eligible students until they are reclassified as fluent English proficient.

This information is used to assist LEAs and schools in the ongoing process of program monitoring and evaluation. And to help determine if a student is ready to be reclassified. The Summative ELPAC and the Summative Alternate ELPAC must be given annually to students identified as ELs until they are reclassified to Fluent English Proficient (RFEP). The Summative ELPAC administration window is open from February 1 through May 31.

Summative ELPAC Student Score Reports

The official score for the Summative ELPAC is produced by the test contractor. The Summative ELPAC report includes the following information:

- An overall performance level and scale score
- A performance level and scale score for each composite tested (Oral and Written Language)
- A performance level for each domain tested (Listening, Speaking, Reading, and Writing)

Scale score ranges for each of the four performance levels are identified for Overall, Oral Language, and Written Language for all grades tested. These ranges incorporate the performance level cut

scores approved by the State Board of Education (SBE). The Summative ELPAC Performance Level Descriptors are:

Level 4: Well Developed

English Learners at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Bridging” proficiency level as described in the 2012 California English Language Development Standards, Kindergarten Through Grade 12 (2012 CA ELD Standards).

Level 3: Moderately Developed

English Learners at this level have moderately developed oral (listening and speaking) and written (reading and writing) skills. They can sometimes use English to learn and communicate meaningfully in various topics and content areas. They need light-to-minimal linguistic support to engage in familiar social and academic contexts; they need moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Expanding” proficiency level through the lower range of the “Bridging” proficiency level as described in the 2012 CA ELD Standards.

Level 2: Somewhat Developed

English Learners at this level have somewhat developed oral (listening and speaking) and written (reading and writing) skills. They can use English to meet immediate communication needs but often are not able to use English to learn and communicate on topics and content areas. They need moderate-to-light linguistic support to engage in familiar social and academic contexts; they need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the low- to mid-range of the “Expanding” proficiency level as described in the 2012 CA ELD Standards.

Level 1: Minimally Developed

English Learners at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts and to communicate on

less familiar tasks and topics. This test performance level corresponds to the “Emerging” proficiency level as described in the 2012 CA ELD Standards.

The Summative Alternate ELPAC Student Score Report

Level 3: Fluent English Proficient

English learners at this level have sufficient English language proficiency (ELP). They may need occasional linguistic support to enable them to access adapted grade-level content in English.

Level 2: Intermediate English Learner

English learners at this level have moderate ELP. They may need frequent linguistic support to enable them to access adapted grade-level content in English.

Level 1: Novice English Learner

English learners at this level have minimal ELP. They need substantial linguistic support to enable them to access adapted grade-level content in English.

Reclassification

California Education Code (EC) Section 313 and the California Code of Regulations (5CCR) Section 11308 require that each English Learner who 1) has demonstrated English language proficiency comparable to that of the average native English speaker and 2) who can participate effectively in a curriculum designed for pupils of the same age whose native language is English be Reclassified Fluent English Proficient (RFEP). Sage Oak Charter School recognizes the importance and irreversibility of this item and has established the following criteria and process to fully address this obligation. Once a student has demonstrated that he/she is ready to participate fully in all English instruction without special support services, the student is ready for reclassification.

Reclassification Criteria

Sage Oak Charter School uses the following criteria to reclassify EL students to RFEP status, as set forth in *EC* Section 313 and Title 5 *California of Regulations* (5 CCR) Section 11303:

1. Summative ELPAC Overall Score of 4 (score of 3 needed for the Summative Alternate ELPAC)
2. Teacher Evaluation by use of the Observation Protocol for Teachers of English Learners (OPTEL)
3. Parent Consultation by use of the OPTEL Parent Consultation Form
4. Evaluation of basic skills relative to the average performance of native English speakers of the same age, based on locally established empirical benchmarks.

Reclassification Process

Reclassification is the culmination of an EL student's participation in the program for English Learners and is conducted each year when the charter receives ELPAC score reports.

Based on the above reclassification criteria, if a student is deemed to qualify for reclassification, a letter will be drafted by the administration. The letter will include all data pertinent to the reclassification. Once the administration and the parent/guardian of the student have signed the form, the reclassification will take place. The language acquisition status of the student will be updated in the student information system, Ellevation, on the EL Master Tracking Spreadsheet, and ultimately in the state reporting system (CALPADS). Additionally, all teachers associated with the student will be informed of the reclassification.

English Learners in Special Education

In accordance with the ED guidance issued in July 2014, the ED requires that all ELs with disabilities, or dually identified students, participate in the state's ELP assessment. Federal law requires that all ELs with disabilities participate in the state ELP assessment in the following ways, as determined by the IEP team:

- In the regular state ELP assessment without universal tools, designated supports, and accommodations
- In the regular state ELP assessment with universal tools, designated supports, and accommodations determined by the IEP team or Section 504 team
- In an alternate assessment aligned with the state's ELD standards, if the IEP team determines that the student is unable to participate in the regular ELP assessment with or without universal tools, designated supports, and accommodations.

Role of the IEP Team

The IEP team is an essential component in establishing the appropriate academic and functional goals, determining the specifically designed instructional program to meet the unique needs of all ELs with disabilities, and making decisions about how students can participate in the state ELP assessment. In accordance with the new ED guidance, the IEP team is responsible for:

- Making decisions about the content of a student's IEP, including whether a student must take a regular state assessment (in this case, the ELPAC assessment), with or without appropriate universal tools, designated supports and/or accommodations, or an alternate assessment in lieu of the regular ELPAC assessment (ED, July 2014, FAQ #4). Students with disabilities who cannot take one or more domains of the ELPAC with approved accessibility resources are eligible for a domain exemption. A domain exemption may be used if an English learner has a disability that precludes assessment of the student in one or more domains of the English

language proficiency assessment such that there are no appropriate accommodations for the affected domain(s). This use of a domain exemption(s) must be identified in the student's individualized educational program (IEP) or Section 504 plan. For a student to be assigned an Overall score, the student will need to be assessed in all domains to receive a student score report.

- Developing an IEP for each student with a disability, including each EL with a disability, at an IEP team meeting, which includes school officials and the child's parents/guardians. The Individuals with Disabilities Education Act (IDEA) regulation in the Code of Federal Regulations, Title 34, (34 CFR) Section 300.321(a) specifies the participants to be included on each child's IEP team. It is essential that IEP teams for ELs with disabilities include persons with expertise in English language acquisition. (ED, July 2014, FAQ #5).
- Ensuring that ELs' parents or guardians understand and are able to meaningfully participate in IEP team meetings at which the child's participation in the annual state ELP assessment is discussed. If a parent whose primary language is other than English is participating in IEP meetings, the IDEA regulations require each public agency to take whatever action necessary to ensure that the parent understands the proceedings of the IEP team meeting, including arranging for an interpreter (34 CFR Section 300.322[e]). When parents themselves are ELs, Title VI of the Civil Rights Act of 1964 also requires that the LEA effectively communicate with parents in a manner and form they can understand, such as by providing free interpretation and/or translation services (ED, July 2014, FAQ #6).

IEP teams will ensure that each English Learner receives appropriate services to develop English proficiency and have equitable access to the full curriculum. Each English Learner's IEP shall include linguistically appropriate goals and objectives based on the student's English proficiency level and the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service. A parental exception waiver is not required for an English Learner whose IEP indicates that instructional services will be provided through an Alternative Program.

Special Education: Assessment

Students whose initial Home Language Survey indicates that a language other than English is spoken will be assessed on the ELPAC test within the first 30 days of school. ELPAC testing is considered to be one of the state's standardized tests; therefore, accommodations/modifications provided in the IEP for any standardized test will apply. SPED students with an existing EL classification will be assessed annually. If the IEP team determines that a student will participate in the California Alternate Assessment (CAA), the team must also determine whether the student qualifies for the Alternate ELPAC.

Special Education: Classification

Students who are classified as English Learners **MUST** have their ELD needs addressed as part of their Individualized Education Program (IEP). Students who have been reclassified as Fluent English Proficient (RFEP) or who were initially identified as Initially Fluent English Proficient (IFEP) are *not* considered English Learners for the purpose of the IEP. Their progress is still monitored, but ELD does not need to be addressed on the IEP.

Special Education Reclassification for Dually Identified Students

In some cases, an IEP team may find that it is the disability that interferes with a dually identified student's ability to demonstrate English fluency due to Communication Disorders and/or Cognitive Disabilities. In these cases, the IEP team assesses student progress and considers reclassification of the student to RFEP status.

The IEP team may be designated to make reclassification decisions as long as team members utilize state reclassification criteria and apply those criteria to students with disabilities according to state guidelines. IEP teams may not modify Criterion 1 for reclassification, which requires meeting the SBE-adopted Overall PL 4 on the Summative ELPAC or PL 3 on the Summative Alternate ELPAC. This allows for all students to be held to a consistent and rigorous standard in demonstrating ELP in order to be exited from EL services.

Ideally, this should be done as early as possible, as soon as one to two summative test administrations, or as soon as there is reasonable evidence that it is a student's disability that prohibits English Language Acquisition.

If the recommendation for reclassification is taking place as part of the student's initial IEP or annual review, then the IEP Team Reclassification Determination Worksheet is to be completed, along with all other pages of the IEP to reflect the recommendation that the student is to be reclassified as RFEP (Reclassified Fluent English Proficient). If the recommendation for reclassification occurs between annual reviews, then in addition to completing the IEP Team Reclassification Determination Worksheet, an *IEP Amendment* meeting and form must also be completed. Because this is an IEP team recommendation, the parents, the EL Assessment Coordinator, and all applicable staff should be a part of the reclassification meeting and decision. If the team decides to reclassify the student as RFEP, the EL Assessment Coordinator will include a copy of the IEP Team Reclassification Determination Worksheet in the student's file. The EL Assessment Coordinator will then follow the regular reclassification process to update the student's English Language Acquisition Status and notify all parties involved. If the reclassification is not agreed upon, the IEP team must ensure that the

IEP continues to address the needs of the student who remains classified as an English learning student.

ELD Program Options

Personalized English Language Mainstream Program

English Learners in Sage Oak Charter Schools participate in an English Language Mainstream Program. This instructional program is designed to promote the acquisition of high levels of English language proficiency and access to the core curriculum. In the mainstream English program, English is the language of instruction for all subjects with no primary language support. Students in an English Language Mainstream Program will be supported by their instructors through the use of SDAIE strategies. Students may also be concurrently enrolled in an ELD support class. English Learners in the English Language Mainstream Program will receive ELD instruction until they are reclassified as English proficient. In the English Language Mainstream Program of Sage Oak Charter Schools:

- Core instruction in language arts, math, science, and social science is taught in English using charter-approved curriculum and SDAIE methodology
- English Language Learners receive both integrated and designated ELD instruction which addresses the ELD standards in listening, speaking, reading and writing.
- Teachers working with EL students will be appropriately authorized, i.e., CLAD or equivalent.

Parent Notification of Programs

All parents of English Learners, regardless of proficiency, must be notified at initial enrollment and annually, in writing, of program placement of their children and must also be provided with a description of our program, including educational materials used in this program and their entitlement to request a waiver. The information must be provided in a language the parents understand within 30 days of enrollment.

Staffing

Staffing Authorizations

Under the management of the Director of Human Resources, Sage Oak Charter Schools takes an active role in the recruitment and staffing of authorized personnel for all English Learner programs

and makes it a priority to hire CLAD or equivalent teachers. Teachers providing instruction in a Mainstream English Program shall be authorized to provide appropriate core content and ELD instruction. This is achieved via a CLAD or equivalent authorization.

Teachers who are not currently authorized but who are working with English Learners, shall be required to sign a memorandum of understanding stipulating that they will be actively participating in professional development designed to secure appropriate authorization within two years. The HR Department will then monitor attendance at professional development activities to ensure that such teachers remain on track to complete the necessary training for their authorizations.

Access to Core Curriculum

All English learners are provided quality, standards-based, rigorous curriculum and instruction in all CORE content areas as well as Advanced Placement courses, enrichment classes, and college and career programs. Integrated ELD instruction and strategies are consistently implemented to meet the individual needs of each English learner.

Specially Designed Academic Instruction in English (SDAIE)

SDAIE is a methodology used to make subject area content, delivered in English, comprehensible in order to meet the needs of limited-English-proficient pupils. Academic instruction through English is modified to meet the student's level of language proficiency. Teachers use specialized strategies that enable students to understand, participate in, and access the core curriculum. (EC 44253.2[b]).

English as the Language of Instruction

In accordance with California Education Code Section 305, all students in California public schools, including those enrolled in independent study programs, must be taught in English for all core academic areas. This is to include, but not limited to, English Language Arts, Math, History, and Science. This requirement ensures that all students, including English Learners, receive equitable access to instruction that promotes English language proficiency and academic success.

To meet this requirement:

- Instruction in all subjects will be provided in English, including synchronous and asynchronous components of the independent study program.
- Participation in synchronous and/or asynchronous instruction for all core academic areas in English is mandatory for all English Learner students, regardless of their English Learner status or participation in an ELD program, as this is essential for meaningful interaction and mastery of academic content.
- Opting out of this instruction is not permitted, as it is integral to ensuring compliance with state law and the successful implementation of Sage Oak's academic program.

This policy ensures that Sage Oak Charter Schools uphold the legal and educational responsibilities to all students, fostering an environment where English language acquisition and academic achievement are prioritized.

English Language Development

English Language Development (ELD) Standards

Sage Oak's English Language Development program is grounded in research and aligned to the 2014 California State ELA/ELD Framework. The ELA/ELD Framework helps define how the California English Language Arts and English Language Development standards will be taught and assessed. Both sets of standards represent the skills, knowledge, and abilities English learners must possess in order to become 21st Century and College and Career Ready and describe what students should know and be able to do at each of the five levels of English proficiency. Sage Oak is committed to implementing the ELA/ELD Framework, the California State Standards, and English Language Development Standards through its adopted ELA/ELD programs. As stated in the ELA/ELD Framework Executive Summary: "The purpose of ELD instruction is to amplify (magnify and make clear) areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. The standards help teachers support EL students to interact meaningfully with others and complex texts, engage in and learn through intellectually challenging tasks across the content areas, develop academic English, and develop awareness about how English works so that they can use it intentionally and purposefully."

The California ELD standards are organized into three parts.

Part I: Interacting in Meaningful Ways

English learners participate in meaningful and intellectually challenging tasks in three ways:

- Collaboratively, by communicating with others about social and academic topics.
- Interpretively, by understanding written and spoken information.
- Productively, by writing or presenting to explain ideas and information.

Part II: Learning About How English Works

English learners comprehend and produce academic texts in various content areas.

- English learners use language to create organized texts, expand and enrich ideas, and connect and condense ideas.

Part III: Using Foundational Literacy Skills.

This section emphasizes how all teachers play a crucial role in developing the literacy of ELs.

- English learners at all grades require specialized instruction to learn foundational literacy skills based on their age, previous literacy, and educational experiences

The CA ELD Standards are aligned to the CA CCSS for ELA/Literacy as they magnify and make clear areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. They promote the notion of supporting English Learners to develop awareness that different languages and variations of English exist and that their home languages and cultures are valuable resources in their own right and useful for building proficiency in English.

Key Themes of ELA/Literacy and ELD Instruction

Meaning Making

Meaning making is at the heart of ELA/literacy and ELD instruction. It is the central purpose for interacting with text, producing text, engaging in research, participating in discussion, and giving presentations. It is the reason for learning foundational skills and for expanding language. Meaning making includes literal understanding but is not confined to it at any grade or with any student. Inference making and critical reading, writing, and listening are given substantial and explicit attention in every discipline. Among the contributors to meaning making are language, knowledge, motivation, and, in the case of reading and writing, the ability to recognize printed words and use the alphabetic code to express ideas.

Language Development

Language is the cornerstone of literacy and learning. It is with and through language that students learn, think, and express information, ideas, perspectives, and questions. The strands of the CA CCSS for ELA/ Literacy—Reading, Writing, Speaking and Listening, and Language—all have language at the core, as do the parts of the CA ELD Standards—Interacting in Meaningful Ways, Learning About How English Works, and Using Foundational Literacy Skills. Students enrich their language as they read, write, speak, listen, interact, and learn about language. The foundational skills provide access to written language.

Effective Expression

Each strand of the CA CCSS for ELA/Literacy and each part of the CA ELD Standards includes attention to effective expression. Students learn to examine the author’s craft as they read, analyzing how authors use language, text structure, and images to convey information, influence their readers, and evoke responses. Students learn to effectively express themselves as writers, discussion partners, and presenters, and they use digital media and visual displays to enhance their expression. They gain command over written and spoken English conventions, and they learn to communicate in ways appropriate for the context and task.

Content Knowledge

Content knowledge is a powerful contributor to the comprehension of text. It also undergirds the ability to write effective opinions/arguments, narratives, and explanatory/informational text, engage in meaningful discussions; and present ideas and information to others. It contributes significantly to language development, and it is fundamental to learning about how English works. Both sets of standards ensure that students can learn from informational texts and can share their knowledge as writers and speakers. An organized independent reading program contributes to knowledge. Content knowledge has a powerful reciprocal relationship with the development of literacy and language.

Foundational Skills

Acquisition of the foundational skills enables students to independently read and use written language to learn about the world and themselves, experience extraordinary and diverse works of literary fiction and nonfiction, and share their knowledge, ideas, stories, and perspectives with others. Students who know how to decode and develop automaticity with an increasing number of words are best positioned to make significant strides in meaning making, language development, effective expression, and content knowledge. At the same time, attention to those themes provides the very reason for learning about the alphabetic code and propels progress in the foundational skills.

Charter schools enrolling English Learners have a dual obligation, as do all LEAs, to provide a program for EL students designed to overcome language barriers and provide access to the core curriculum (*Castañeda v. Pickard* 648 F.2d 989, [5th Cir. 1981]). The CDE recognizes that both services, including classified ELD, must be an integral part of a comprehensive program for every English Learner.

The ability to read, write, and communicate with competence and confidence in English across a range of personal and academic contexts expands students' opportunities for career and college success, full and wise participation in a democratic society and global economy, and achievement of their personal aspirations. Moreover, literacy and language skills provide individuals with access to extraordinary and powerful literature that widens perspectives, illuminates the human experience, and deepens understandings of self and others.

Designated English Language Development

Sage Oak's English language development program is designed to support the academic success and reclassification of English learners. The teacher implements techniques, methodology, and supplemental curriculum designated to teach ELs explicitly about the English language, academic vocabulary, and develop their English language proficiency in all four language domains: speaking, listening, reading, and writing. Sage Oak Charter Schools will create a personalized ELD instruction pathway geared to the student's level of English proficiency.

Designated ELD instruction and individual academic support are provided to English learners during dedicated times each week. Students are grouped for designated ELD by their English language proficiency levels (Emerging, Expanding, Bridging). However, the three levels of language proficiency are not static but rather represent a continuum of language learning and decisions about grouping will be made in the student's best interest. Teachers use the student's production and interpretation of the English language to choose appropriate learning supports, inform instructional decisions, and keep track of academic progress.

Instructional Materials to Support the CA CCSS for ELA/Literacy and CA ELD Standards

The Designated ELD curriculum and materials were chosen specifically to address the varied cultural and language backgrounds our English learners possess, enabling learners and educators to celebrate their own cultures and everyday lived experiences while also learning about those of others. It includes authentic content from around the world to develop the student's understanding of different cultures and viewpoints of others around the globe.

The State Board of Education adopts instructional materials for use by students in kindergarten through grade eight. LEAs- school districts, charter schools, and county offices of education- ARE NOT required to purchase state-adopted instructional materials according to EC Section 60210(a). If an LEA chooses to use non-adopted materials, it has the responsibility to adopt materials that best meet the needs of its students and to conduct its own evaluation of instructional materials. The review must include a majority of classroom teachers from that content area or grade-level ED Section 60210(c). EC Section 60002 requires the LEA to promote the involvement of parents and other members of the community in the selection of instructional materials, in addition to teacher involvement.

Professional Learning

Professional Development

Sage Oak Charter Schools provides ongoing professional development opportunities to all teachers and staff working with English Learners. The goal of this training is to help educators acquire specific skills needed to work with English Learners in the areas of ELD instruction, comprehensible core content instruction, program designs, curriculum expectations, and processes and services for English Learners. Training should also focus on multiculturalism and up-to-date research and pedagogy for English Learners to receive equitable and accessible support and opportunities to achieve and reach their goals.

Staff development opportunities include, but are not limited to, the following:

- ELD Standards
- ELPAC assessment and identification levels
- ELD strategies and instruction
- SDAIE strategies and instruction
- Differentiated instruction
- Ellevation Database Training
- Shared Best Practices

To ensure that all staff working with parents of EL students are appropriately trained, training participation and completion are documented.

Family & School Partnerships

Sage Oak Charter Schools seeks to promote positive collaboration between parents and the school by promoting open communication and developing a working partnership between parents and the schools to provide equal access to education for all students. Parents of English Learners (EL) are encouraged to participate in their children's education and be active in assisting their children in attaining English proficiency, achieving academically at high levels, and meeting state standards. Parents are given information about the English Learner Advisory Committee (ELAC) and are encouraged to participate.

English Learner Advisory Committee (ELAC)

An English Learner Advisory Committee is a school-level committee composed of parents, staff, and community members designated to advise school officials on English learner programs and services and is required for any California public school with 21 or more English Learners. The ELAC shall be responsible for the following tasks:

- Advising the principal and staff in the development of a site plan for English learners.
- Assisting in the development of the schoolwide needs assessment.
- Ways to make parents aware of the importance of regular school attendance.
- Assisting in the evaluation of the English Learner Master Plan.
- Each ELAC shall have the opportunity to select at least one member to the District English Learner Advisory Committee (DELAC). Districts with 31 or more ELACs may use a system of proportional or regional representation. Parents or guardians of English Learners shall constitute at least the same percentage of the ELAC membership as their children represent the student body. The parents or guardians of English Learners shall elect the parent members of ELAC. Parents or guardians of English Learners shall be provided the opportunity to vote in the election. ELAC members shall receive training materials and training that will assist them in carrying out their required advisory responsibilities. Training shall be planned in full consultation with committee members, and funds from appropriate resources may be used to meet the costs of providing the training including costs associated with the attendance of members at training sessions. ELAC meeting agendas will be posted on the school website.

ELAC Membership

All parents/guardians of ELs and recently RFEPed students (within the academic school year) have an opportunity to participate as members of the committee. Members receive training and materials to assist members in carrying out their legal responsibilities in alignment with California

Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a) and California Code of Regulations, Title 5, Section 11308.

The ELAC is composed of the following:

- Principal or designee
- Parents of EL and students redesignated (RFEP) within the academic school year.
- School staff

Assessment and Student Program Monitoring

Accountability and Evaluation

California has been working for the past several years to improve education at the state level. The goal is to increase the academic achievement of all students by creating a coordinated system through the use of content and performance standards. In response to statewide accountability reform, Sage Oak Charter Schools provides clearly defined standards and expectations for student learning. It has a primary goal that all students will meet the charter's academic content and performance standards.

Through the Sage Oak Charter Schools assessment program, the assessment and accountability department carefully considers what students are asked to do, how student performance is evaluated, and how evaluation results are used. The assessment program is responsive to the developmental differences, linguistic differences, and special needs of English Learners. Through multiple forms of assessment, Sage Oak Charter Schools is able to determine to what degree English Learners are achieving English proficiency and meeting academic achievement goals.

Sage Oak Charter Schools' assessment practices with respect to English Learners are designed to:

- Assess and monitor language development by time in the program
- Assess academic achievement in meeting grade level core standards
- Assess progress of ELs achieving ELD grade level standards
- Ensure learning opportunities in reading and writing are provided
- Monitor that targeted interventions are working

Assessment data is compiled, analyzed and reported by Sage Oak Charter Schools leads and Data and Assessment Department. Their reports are then analyzed by the school leadership team, to produce a set of suggested program modifications, which are then shared with the Board of Directors, teachers, and EL parents for additional input and approval.

Sage Oak Charter Schools annually determines the number and percentage of EL students who have become RFEP through ongoing uploads of information to CALPADS. CALPADS reports the actual count of EL, IFEP, and RFEP students during the calendar year as well as the number of teachers providing and authorized to provide appropriate instruction for English Learners.

Monitoring of Long-Term English Learners

Long-term English Learners (LTEL) are defined as students who are in grades 6 to 12, have been enrolled in U.S. schools for more than six years, have remained at the same level of English for two or more years as measured by the state's annual proficiency exam, and have scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

ELs with little or no English proficiency need more time than native-English speakers to meet grade-level benchmarks in English and state-mandated testing targets. Schools must monitor student progress to ensure that additional and appropriate learning opportunities are provided in English language development and in reading, writing, and other academic content areas in order to close the achievement gap.

Benchmark assessments, course grades, and the CAASPP assessments, along with the number of years a student has been classified as an EL student, are used to determine if a student is making the appropriate movement toward becoming RFEP.

If, despite the implementation of school-wide interventions and supports, a student is still not making "adequate progress," the school will hold a Student Study Team meeting to discuss the lack of progress. The SST team will plan further evaluation and intervention to support students who are not meeting interim benchmarks. Interventions will be noted and filed on the EL Master Tracking Spreadsheet, in their cumulative folder, and/or in a collaborative Google document. Additionally, parents will be notified annually if their student is at risk of becoming an LTEL or has been classified as an LTEL.

Meeting the Needs of Long-Term English Learners

The National Education Association's Publication: Meeting the Unique Needs of Long-Term English Language Learners, A Guide for Educators provides valuable research-based information and best practices to guide schools and LEAs in supporting students at risk for becoming Long Term English Learners (LTEL).

Elementary School Strategies and Programs that Prevent the Creation of Long-Term English Language Learners:

The trajectory of a Long Term English Language Learner begins in elementary school. Taking the necessary steps early enough can help prevent an entire new generation of long-term ELL students. Successful elementary school programs offer high-quality language development programs and strategies that are consistent across grade levels.

- English Language Development/English as a Second Language: Dedicated, daily, and standards-based ELD/ESL programs address the specific needs of students at each fluency level and support instruction with quality materials that focus on all four language domains—with a major emphasis on building a strong oral language foundation; using language for interaction and meaning-making; and developing complex, precise, and academic language.
- Home language development: Programs that develop students' home language (oral and literacy) to threshold levels are a strong foundation for developing English literacy and academic success (at least through third grade, more powerfully through fifth grade, and optimally, ongoing throughout a student's education). Teaching students to read in their first language promotes higher levels of reading achievement in English and provides students with the benefits of bilingualism.
- Use curriculum, instruction, and strategies. Use resources that promote transfer between English and the home language.
- Enriched oral language development: Emphasize oral language throughout the curriculum.
- Modified instructional strategies and supplemental materials provide access to academic content.
- Program coherence and consistency: Provide coherence and consistency of program across grades, including, wherever possible, articulation and alignment with preschool.
- High-quality literature: Provide students/LTEs with exposure to high-quality literature and complex and expressive language.

Seven Basic Principles for Meeting the Needs of Middle and High School LTEs

Seven basic principles lie at the heart of successfully educating middle and high school Long Term English Language Learners:

1. Urgency: Focus urgently on accelerating LTEL progress towards attaining English proficiency and closing academic gaps.
2. Distinct needs: Recognize that the needs of LTEs are distinct and cannot adequately be addressed within a "struggling reader" paradigm or a generic "English Language Learner" approach, but require an explicit LTEL approach.

3. Language, literacy, and academics: Provide LTELs with language development, literacy development, and a program that addresses the academic gaps they have accrued.
4. Home language: Affirm the crucial role of home language in a student's life and learning, and provide home language development whenever possible.
5. Three R's: rigor, relevance, and relationships: Provide LTELs with rigorous and relevant curriculum and relationships with supportive adults (along with the supports to succeed).
6. Integration: End the ESL ghetto, cease the sink-or-swim approach, and provide maximum integration without sacrificing access to LTEL supports.
7. Active engagement: Invite, support, and insist that LTELs become active participants in their own education.

Instructional Support System

The Charter School is committed to closing the achievement gap for all students, including English Learners. The Instructional Support System for English Learners is a part of the standards-based system of instruction, assessment, monitoring, and evaluation provided for all students.

The Instructional Support System for English Learners is designed to provide the mechanisms for recording EL achievement, detecting academic deficits, and monitoring the effectiveness of interventions.

To ensure all students will catch up to their grade-level peers, we have the following essential elements:

1. All English Learners are held to the same Charter-adopted curriculum and performance standards in the core curricular areas as all other students.
2. All English Learners participate in a program of curriculum and instruction that is aligned to state content standards and designed to reduce all language barriers. The English Learner program is designed to ensure that participating EL students acquire English and learn grade-level academic content simultaneously and to the greatest extent possible. Components of this program include ELD, grade-level core curriculum, and assessment.
3. The Instructional Support System for English Learners includes an assessment and reporting process of student academic achievement for all students, including English Learners. The use of multiple measures, the disaggregating of student achievement data, and the regular reporting of student achievement data are integral components of the Charter assessment and reporting process and are recorded in the Ellevation platform.
4. The performance of EL and RFEP students is monitored:

- a. Students identified in need of interventions are provided the appropriate intervention aimed at filling in gaps in content knowledge so that ELs can gain full access to grade-level core content instruction in a reasonable period of time.
- b. Any areas of deficiency are noted, and appropriate modifications in instructional programs or student support systems are identified.

The Instructional Support System described here for ELs is based on five (5) essential elements that include adopted curriculum standards; curriculum and instruction aligned with adopted standards; assessment and reporting; charter and site level monitoring and intervention; and program evaluation.

1. **Adopted Curriculum Standards:** In Sage Oak Charter Schools each English Learner is held to the same charter-adopted curriculum standards in the core curricular areas of English Language Arts, math, history-social science, and science as every other charter student. In addition, each EL student is expected to demonstrate mastery of the adopted ELD standards.
2. **Curriculum and Instruction Aligned with Adopted Standards:** Sage Oak Charter Schools supports each English Learner in his/her appropriate level of language development in the core courses. Each English Learner participates in an instructional program with state-adopted materials that are aligned with charter and state standards. Through articulation meetings, staff members discuss and interpret data on English Learner students to address the issues surrounding English Learners who may have been in the educational system for some time and seem unable to move beyond this level.
3. **Assessment and Reporting:** Sage Oak Charter Schools administers all state-mandated examinations. ELPAC assessments and ongoing multiple measures are used to assess student proficiency. Results are entered into the EL Master Tracking Spreadsheet for instructional planning and monitoring. Overall, student results are shared with the CEO and governing board.
4. **Monitoring and Intervention:** English Learner's assessment results are recorded on the EL Master Tracking Spreadsheet. The results are monitored to evaluate student learning in order to inform instruction and provide interventions as needed. When, according to ongoing assessments, students cannot meet interim expectations in academic content, they shall be referred by teachers and parents to receive academic interventions and support that enable them to overcome any academic deficits before they become irreparable. The intervention itself will directly target the identified academic need. Delivery of the intervention shall be monitored and documented. The effectiveness of the intervention will then be determined based on student work and assessments.
5. **Program Evaluation:** Sage Oak will conduct periodic evaluations of the effectiveness of its ELL program to determine if any modifications or improvements are required. This evaluation will

include looking at the implementation of the ELL program, the effectiveness of the ELL program in meeting its goals for students (English language development and the ability to participate meaningfully in the educational program), and gathering appropriate input from knowledgeable persons and other stakeholders.

Note: When Special Education students, identified as ELs, are not making adequate progress, Special Education teachers must schedule an IEP meeting to discuss further interventions.

Monitoring of Reclassified Students

The school's Lead, teachers, parents, and the assessment Lead supervise the process of monitoring reclassified students. School staff will use the Smarter Balanced assessment, local multiple measure scores, and teacher assessments and observations to semi-annually monitor the progress of RFEP students for a period no less than four (4) years after reclassification. Student performance shall be reviewed at each progress reporting period. Those students found to be regressing in their academic performance will be referred to receive an academic intervention in the specific area of need. This monitoring of RFEP students is recorded in the Ellevation platform.

Sage Oak Charter Schools

English Learner Master Plan

2025-2026~~2024-2025~~



Presented by: Sage Oak Charter Schools

Board Approved June 12, 2025~~13, 2024~~

Commitment and Purpose

Mission

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

Vision

Sage Oak students embrace their unique potential and are inspired to positively impact their communities.

Goals and Objectives

The Sage Oak English Learner Master Plan serves as a guide and gives an overview of the programs and resources provided for our English learners. The plan is centered around our vision, core beliefs, and goals for all students in our schools and affirms our commitment to each English learner as an individual by honoring their diversity and accelerating their English language proficiency while preparing them for the rigors of college, future careers, and becoming a productive and engaged global citizen.

The English Learner Master Plan provides a clear statement of policies related to the development, implementation, and evaluation of English learner programs and services that are required by all state and federal guidelines. These policies are based on current resources and initiatives related to the 2012 CA ELD Standards, the 2014 English Language Arts (ELA)/English Language Development (ELD) Framework and the California English Learner Roadmap and are in place in order to:

- Ensure that English learners will achieve English language proficiency as quickly as possible.
- Support the academic success of English learners by consistently providing high-quality services designed to meet their academic and linguistic needs.
- Develop cross-cultural awareness and appreciation of one's own culture and language, encourage bilingualism, and enhance the positive self-esteem of English learners.
- Embrace and encourage parent and community involvement in meeting the needs of English learners.
- Provide staff and parent training in the implementation of effective instructional programs and teaching strategies for English learners.
- Providing a process for monitoring the effectiveness of the program.

Guiding Principles of the California English Learner Roadmap

The California English Learner Roadmap will guide Sage Oak to continuous improvement of the EL program over time. The Roadmap emphasizes four principles and approaches to teaching and learning that result in a more powerful, twenty-first-century education for all English learners.

Principle One: Assets-Oriented and Needs-Responsive Schools

Pre-schools and schools are responsive to different English learner (EL) strengths, needs, and identities and support the socio-emotional health and development of English learners. Programs value and build upon the cultural and linguistic assets students bring to their education in safe and affirming school climates. Educators value and build strong family, community, and school partnerships.

Principle Two: Intellectual Quality of Instruction and Meaningful Access

English learners engage in intellectually rich, developmentally appropriate learning experiences that foster high levels of English proficiency. These experiences integrate language development, literacy, and content learning, as well as provide access for comprehension and participation through native language instruction and scaffolding. English learners have meaningful access to a full standards-based and relevant curriculum and the opportunity to develop proficiency in English and other languages.

Principle Three: System Conditions that Support Effectiveness

Each level of the school system (state, county, district, school, pre-school) has leaders and educators who are knowledgeable of and responsive to the strengths and needs of English learners and their communities and who utilize valid assessment and other data systems that inform instruction and continuous improvement. Each level of the system provides resources and tiered support to ensure strong programs and build the capacity of teachers and staff to leverage the strengths and meet the needs of English learners.

Principle Four: Alignment and Articulation Within and Across Systems

English learners experience a coherent, articulated, and aligned set of practices and pathways across grade levels and educational segments, beginning with a strong foundation in early childhood and appropriate identification of strengths and needs and continuing through to reclassification, graduation, higher education, and career opportunities. These pathways foster the skills, language(s), literacy, and knowledge students need for college- and career-readiness and participation in a global, diverse, multilingual, twenty-first-century world through Integrated ELD.

For additional information, visit the [CDE English Learner Roadmap web page](#).

Sage Oak Charter Schools EL Population

Sage Oak Charter Schools serve a student population of TK through grade 12. Our English Learners make up approximately 2.2%. There are 142 different languages spoken by Sage Oak EL students, with most of the EL students' primary language being Spanish.

Responding to Diverse Learners

Identification of English Learner Students

Federal Law mandates that all students in K–12, upon first enrollment in a California public school, the Local Education Agency (LEA) uses a standardized procedure to determine a student's primary language.

Home Language Survey

This procedure begins with a home language survey (HLS), which is completed once by the parent or guardian at the time the student is initially enrolled in a California public school. The HLS is used as the primary screener to identify if the student uses a primary language other than English. If at least one of the first three questions on the HLS is answered with a language "other than English", the assessment process to determine English language fluency begins. This process includes testing the student's English proficiency with the state-adopted English language proficiency assessment, English Language Proficiency Assessments for California (ELPAC). The initial assessment will be administered within thirty (30) calendar days of enrollment. In cases where parents/guardians answer 'English' to all questions on the HLS, but educators notice the student using another language, this student may be assessed on the initial ELPAC so the school provides the child's civil right to access education. Parents and school personnel should work collaboratively to identify if the child is or is not an English learner.

The HLS should not be readministered yearly or readministered if a student enrolls in a new LEA. If the HLS is completed in error, the parent or guardian may make a request to change it prior to the assessment. However, once a student is identified as an EL on the basis of the results of the Initial ELPAC and the student has been administered the Summative ELPAC, changing the HLS will not change the student's identification. While cumulative student records are in transit for a student transferring from another California School District, **the California Longitudinal Pupil Achievement Data System (CALPADS)** shall be used to determine whether a student has a history of being an English Language Learner. If a student has a history of being an English Learner, the student will be given an annual Summative ELPAC assessment during the February 1st through May 31st test window.

ELPAC Assessment

For California's public school students, the English Language Proficiency Assessment for California (ELPAC) is the required state test for English Language Proficiency (ELP) that must be given to students whose primary language is not English, as determined by the HLS or teacher observation. State law (California Education Code [EC] sections 313 and 60810) and federal law (Titles I and III of the Every Student Succeeds Act [ESSA], the reauthorization of the Elementary and Secondary Education Act [ESEA]) require that LEAs administer a state test of English language proficiency (ELP) and develop an English Learner Progress Indicator (ELPI) for (1) newly enrolled students **in grades K-12** whose primary language is not English, as an initial assessment; and (2) students who are English Learners (ELs) as a summative assessment. ELPAC results are not used to measure academic achievement. **There is no opt-out option for the ELPAC for eligible students. State and federal laws require that all English learner students be assessed annually on the state English language proficiency assessment until reclassified as fluent English proficient.**

Once tests are scored by the testing agency, individual student score reports (SSRs) are loaded directly to both the parent and student portals of the school's student information system from the Test Operation Management System. Once scores are received, parents will also be informed of test results within 30 calendar days from the first day of the current school year via email. **and/or through US-mail.** If some or all SSRs are received after the last day of instruction for the school year, parents will receive the SSR within 15 working days at the start of the next school year. Parents/guardians are notified of results in writing in a language they can understand (or orally if they are unable to understand written communication). Parents will also be notified in any language of which 15% or more of the student population speaks in common. Additionally, each student's test results are uploaded to the charter's student information system, **as well and as recorded in our database, Ellevation, and on the English Language Master Tracking Sheet. nd-on the English Language Master Tracking Spreadsheet.** When a student withdraws from Sage Oak Charter School, a list of the student's test results will be printed from the student information system and included in the student's requested cumulative file.

Initial ELPAC Assessment

The Initial ELPAC aims to identify students who are ELs or are initial fluent English proficient (IFEP). All students in kindergarten through grade twelve (K-12), ages three through twenty-one, whose primary language is a language other than English must take the Initial ELPAC within 30 calendar days after they are first enrolled in a California public school or 60 calendar days prior to instruction, but not before July 1, per ELPAC regulations.

The Initial ELPAC window is from July 13, 2025⁵⁴, to June 30, 2026⁵⁵. The Initial ELPAC measures the ELP in the four language domains of listening, speaking, reading, and writing and identifies students as beginning either fluent in English (IFEP) or an English Learner (Intermediate or Novice).

The Initial Alternate ELPAC is administered as an initial assessment to newly enrolled students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments and have a language other than English, as indicated on a home language survey

Initial ELPAC and Alternate Initial ELPAC Student Score Reports

The official score for the Initial ELPAC and the Alternate Initial ELPAC is produced once the LEA has entered and locked in the student's raw scores into the state assessment system. Individual student Initial ELPAC results include:

1. An Overall performance level and scale score which will indicate which of the three performance levels the student achieved: IFEP, Intermediate EL, and Novice EL.

Initial Fluent English Proficient (IFEP)

Students at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts.

Intermediate English Learner

Students at this level have somewhat developed to moderately developed oral (listening and speaking) and written (reading and writing) skills. This level captures a broad range of English learners, from those who can use English only to meet immediate communication needs to those who can, at times, use English to learn and communicate in meaningful ways on a range of topics and content areas.

Novice English Learner

Students at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts. They need substantial linguistic support to communicate on less familiar tasks and topics.

2. A performance level for each composite tested (Oral and Written Language) is well-developed, somewhat to moderately developed, and minimally developed.

The initial ELPAC results are used to identify ELs who need to develop their listening, speaking, reading, and writing skills in English. This information, used with other local assessments, assists LEAs and schools when making placement decisions for new students who are identified as ELs. The initial ELPAC results are also used to identify students who are IFEP and are able to participate in the regular (core) academic program without further English language support. More information for families and staff can be found at <https://www.caaspp-elpac.org> or ~~on the~~ [California Department of Education: Parent Guides to Understanding at https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp](https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp) ~~CDE Initial Assessment Fact Sheet.~~

Summative ELPAC Assessment

The Summative ELPAC is given only to students who have previously been identified as English Learners based upon Initial ELPAC results. The Summative ELPAC is aligned with the 2012 California English Language Development Standards, ~~and~~ [measures the English Language Proficiency \(ELP\)](#) ~~and~~ how well a student is progressing with English development in each of the four domains: Listening, Speaking, Reading, and Writing.

The Summative Alternate ELPAC is a summative assessment for EL students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments. This assessment must be administered annually to eligible students until they are reclassified as fluent English proficient.

This information is used to assist LEAs and schools in the ongoing process of program monitoring and evaluation. And to help determine if a student is ready to be reclassified. The Summative ELPAC ~~and the Summative Alternate ELPAC~~ must be given annually to students identified as ELs until they are reclassified to Fluent English Proficient (RFEP). The Summative ELPAC administration window is open from February 1 through May ~~31~~²⁹.

Summative ELPAC Student Score Reports

The official score for the Summative ELPAC is produced by the test contractor. The Summative ELPAC report includes the following information:

- An overall performance level and scale score
- A performance level and scale score for each composite tested (Oral and Written Language)
- A performance level for each domain tested (Listening, Speaking, Reading, and Writing)

Scale score ranges for each of the four performance levels are identified for Overall, Oral Language, and Written Language for all grades tested. These ranges incorporate the performance level cut

scores approved by the **State Board of Education (SBE)**. The Summative ELPAC Performance Level Descriptors are:

Level 4: Well Developed

English Learners at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Bridging” proficiency level as described in the 2012 California English Language Development Standards, Kindergarten Through Grade 12 (2012 CA ELD Standards).

Level 3: Moderately Developed

English Learners at this level have moderately developed oral (listening and speaking) and written (reading and writing) skills. They can sometimes use English to learn and communicate meaningfully in various topics and content areas. They need light-to-minimal linguistic support to engage in familiar social and academic contexts; they need moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Expanding” proficiency level through the lower range of the “Bridging” proficiency level as described in the 2012 CA ELD Standards.

Level 2: Somewhat Developed

English Learners at this level have somewhat developed oral (listening and speaking) and written (reading and writing) skills. They can use English to meet immediate communication needs but often are not able to use English to learn and communicate on topics and content areas. They need moderate-to-light linguistic support to engage in familiar social and academic contexts; they need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the low- to mid-range of the “Expanding” proficiency level as described in the 2012 CA ELD Standards.

Level 1: Minimally Developed

English Learners at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts and to communicate on

less familiar tasks and topics. This test performance level corresponds to the “Emerging” proficiency level as described in the 2012 CA ELD Standards.

The Summative Alternate ELPAC Student Score Report

Level 3: Fluent English Proficient

~~Students English learners~~ at this level have sufficient English language proficiency (ELP). They may need occasional linguistic support to enable them to access adapted grade-level content in English.

Level 2: Intermediate English Learner-

~~Students English learners~~ at this level have moderate ELP. They may need frequent linguistic support to enable them to access adapted grade-level content in English.

Level 1: Novice English Learner

English learners at this level have minimal ELP. They need substantial linguistic support to enable them to access adapted grade-level content in English.

Reclassification

California Education Code (EC) Section 313 and the California Code of Regulations (5CCR) Section 11308 require that each English Learner who 1) has demonstrated English language proficiency comparable to that of the average native English speaker and 2) who can participate effectively in a curriculum designed for pupils of the same age whose native language is English be Reclassified Fluent English Proficient (RFEP). Sage Oak Charter School recognizes the importance and irreversibility of this item and has established the following criteria and process to fully address this obligation. Once a student has demonstrated that he/she is ready to participate fully in all English instruction without special support services, the student is ready for reclassification.

Reclassification Criteria

Sage Oak Charter School uses the following criteria to reclassify EL students to RFEP status, as set forth in *EC* Section 313 and Title 5 *California of Regulations* (5 CCR) Section 11303:

1. Summative ELPAC Overall Score of 4 (score of 3 needed for the Summative Alternate ELPAC)
2. Teacher Evaluation by use of the Observation Protocol for Teachers of English Learners (OPTEL)
3. Parent Consultation by use of the OPTEL Parent Consultation Form
4. Evaluation of basic skills relative to the average performance of native English speakers of the same age, based on locally established empirical benchmarks ~~Basic Skills Relative to Average~~

~~Native English Speakers including local assessments and/or CAASPP/Smarter Balanced assessments.~~

Reclassification Process

Reclassification is the culmination of an EL student's participation in the program for English Learners and is conducted each year when the charter receives ELPAC score reports.

Based on the above reclassification criteria, if a student is deemed to qualify for reclassification, a letter will be drafted by the administration. The letter will include all data pertinent to the reclassification. Once the administration ~~and the parent/guardian of the student have~~ signed the form, ~~and the parents of the student,~~ the reclassification will take place. The language acquisition status of the student will be updated in the student information system, ~~Ellevation~~, on the EL Master Tracking Spreadsheet, and ultimately in the state reporting system (CALPADS). Additionally, all teachers associated with the student will be informed of the reclassification.

English Learners in Special Education

In accordance with the ED guidance issued in July 2014, the ED requires that all ELs with disabilities, ~~or dually identified students~~, participate in the state's ELP assessment. Federal law requires that all ELs with disabilities participate in the state ELP assessment in the following ways, as determined by the IEP team:

- In the regular state ELP assessment without universal tools, designated supports, and accommodations
- In the regular state ELP assessment with universal tools, designated supports, and accommodations determined by the IEP team or Section 504 team
- In an alternate assessment aligned with the state's ELD standards, if the IEP team determines that the student is unable to participate in the regular ELP assessment with or without universal tools, designated supports, and accommodations.

Role of the IEP Team

The IEP team is an essential component in establishing the appropriate academic and functional goals, determining the specifically designed instructional program to meet the unique needs of all ELs with disabilities, and making decisions about how students can participate in the state ELP assessment. In accordance with the new ED guidance, the IEP team is responsible for:

- Making decisions about the content of a student's IEP, including whether a student must take a regular state assessment (in this case, the ELPAC assessment), with or without appropriate

universal tools, designated supports and/or accommodations, or an alternate assessment in lieu of the regular ELPAC assessment (ED, July 2014, FAQ #4). ~~Students with disabilities who cannot take one or more domains of the ELPAC with approved accessibility resources are eligible for a domain exemption. A domain exemption may be used if an English learner has a disability that precludes assessment of the student in one or more domains of the English language proficiency assessment such that there are no appropriate accommodations for the affected domain(s). This use of a domain exemption(s) must be identified in the student's individualized educational program (IEP) or Section 504 plan. For a student to be assigned an Overall score, the student will need to be assessed in all domains to receive a student score report.~~

- Developing an IEP for each student with a disability, including each EL with a disability, at an IEP team meeting, which includes school officials and the child's parents/guardians. The Individuals with Disabilities Education Act (IDEA) regulation in the Code of Federal Regulations, Title 34, (34 CFR) Section 300.321(a) specifies the participants to be included on each child's IEP team. It is essential that IEP teams for ELs with disabilities include persons with expertise in English language acquisition. ~~and other professionals, such as speech language pathologists, who understand how to differentiate between English proficiency development and disability~~ (ED, July 2014, FAQ #5).
- Ensuring that ELs' parents or guardians understand and are able to meaningfully participate in IEP team meetings at which the child's participation in the annual state ELP assessment is discussed. If a parent whose primary language is other than English is participating in IEP meetings, the IDEA regulations require each public agency to take whatever action necessary to ensure that the parent understands the proceedings of the IEP team meeting, including arranging for an interpreter (34 CFR Section 300.322[e]). When parents themselves are ELs, Title VI of the Civil Rights Act of 1964 also requires that the LEA effectively communicate with parents in a manner and form they can understand, such as by providing free interpretation and/or translation services (ED, July 2014, FAQ #6).
- ~~Ensuring that all ELs, including those with disabilities, participate in the annual state ELPAC assessment, with or without universal tools, designated supports, and accommodations or take the Alternate ELPAC, if necessary (ESSA Section 1110[b][7] and IDEA Section 612[a][16][A]). An IEP team cannot determine that a particular EL with a disability should not participate in the annual state ELP assessment (ED, July 2014, FAQ #7). ¶~~

IEP teams will ensure that each English Learner receives appropriate services to develop English proficiency and have equitable access to the full curriculum. Each English Learner's IEP shall include linguistically appropriate goals and objectives based on the student's English proficiency level and the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each

IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service. A parental exception waiver is not required for an English Learner whose IEP indicates that instructional services will be provided through an Alternative Program.

Special Education: Assessment

Students whose initial Home Language Survey indicates that a language other than English is spoken will be assessed on the ELPAC test within the first 30 days of school **annually**. ELPAC testing is considered to be one of the state's standardized tests; therefore, accommodations/modifications provided in the IEP for any standardized test will apply. ~~SPEDed~~ students with an existing EL classification will be assessed annually. ~~If a student is slated to take the ELPAC test, who also would qualify for the CAA, the Special Education Director will be notified so that we can evaluate the need for the Alternate ELPAC. If the IEP team determines that a student will participate in the California Alternate Assessment (CAA), the team must also determine whether the student qualifies for the Alternate ELPAC.~~

Special Education: Classification

Students who are classified as English Learners MUST have their ELD needs addressed as part of their Individualized Education Program (IEP). Students who have been reclassified as Fluent English Proficient (RFEP) or who were initially identified as Initially Fluent English Proficient (IFEP) are *not* considered English Learners for the purpose of the IEP. Their progress is still monitored, but ELD does not need to be addressed on the IEP.

¶

Needs of English Learners¶

~~The needs of English Learners are addressed in several places on the IEP.¶~~

~~Student Information:¶~~

- ~~• Is the student an English Learner?¶~~
- ~~• What is the student's primary language?¶~~
- ~~• Proficiency Level and Date: Overall ELPAC proficiency level and scaled score from most recent annual assessment (This information can be obtained from the English Learner/Assessment Lead, the SIS, the EL Master Tracking Spreadsheet, or from the English Learner folder that is part of the student's cumulative file)¶~~
- ~~• Is an interpreter required? (for the parents) Indicate the language of the interpreter.¶~~

¶

~~Present Levels:¶~~

- ~~• Most recent ELPAC scores should be listed for each domain area (list performance level as well as scaled score)¶~~

- ~~Academic Skills:~~ In addition to the academic data usually included, it should be indicated how the student's English language development needs, if any, will be addressed in each academic area. For each area on the ELPAC that falls below level 3, the student's IEP must have a goal written to address that area (i.e., listening, speaking, reading, and/or writing).¶
- ~~Communication:~~ Information on the student's language development should be specified in this section of the IEP, including the student's primary language and how the student's language development (expressive and receptive) relates to his/her ability to communicate with others and its impact on his/her school performance.¶

¶

~~Special Factors:~~¶

- ~~Testing Accommodations/Modifications:~~ All applicable and appropriate testing accommodations for the ELPAC will be listed in the student's IEP. If the student needs the same accommodations or modifications as are being used on the GAASPP tests, the box next to "Other statewide/charter assessments" will be checked, and "Same as Above" for the listed accommodation/modification will be written.¶

¶

~~Annual Goals:~~¶

- ~~Each English Learner's IEP shall include linguistically appropriate goals and objectives based on the student's English proficiency level and the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service.~~¶
- ~~For each area on the ELPAC that falls below level 3, the student's IEP must have a goal written to address that area (i.e. listening, speaking, reading, and/or writing).~~¶
- ~~Ensure that goals are linguistically appropriate (see below)~~¶

¶

~~Services:~~¶

- ~~If the student requires any supplemental aids or services or any special education services to enable the student to benefit from their ELD services or setting, they will be listed in the IEP. If the IEP team determines that the student's program should be modified from that of other ELD students in order to meet the student's unique educational needs, that modification should be listed in the IEP.~~

~~Writing Linguistically Appropriate Goals and Benchmarks~~¶

- ~~Based on the most recent ELPAC results and other information on the Present Levels page, identify the "Areas of Need" that the IEP goals will address in listening, speaking, reading, and writing.~~¶
- ~~In the Baseline section, describe what the student is currently able to do in the skill area of need and indicate the ELPAC proficiency level in parenthesis. For example Area of Need:~~

~~Writing, *Baseline*: Student is able to write simple sentences with some errors in grammar and syntax (ELPAC Writing Level 1).~~

- ~~• Write (or modify from a goal bank selection) an annual goal to ensure that it is linguistically appropriate and includes the words "in English." For example: By (date), following teacher led prewriting activities, (student name) will compose a single paragraph in English, including a topic sentence, three supporting sentences, and a concluding paragraph with ___% accuracy in ___ of ___ trials as measured by student work samples.~~

~~¶~~

~~Note: It is best practice to insert the phrase "**in English**" to emphasize the language component of the goal.~~

~~¶~~

~~Check the "Linguistically Appropriate" box to indicate the goal is linguistically appropriate to meet the student's English language development needs.~~

~~¶~~

Special Education ~~EL~~ Reclassification for Dually Identified Students

In some cases, an IEP team may find that it is the disability that interferes with a **dually identified** student's ability to demonstrate English fluency due to ~~Communication Disorders~~ and/or Cognitive Disabilities. In these cases, the IEP team assesses student progress and considers reclassification of the student to RFEP status.

The IEP team may be designated to make reclassification decisions as long as team members utilize state reclassification criteria and apply those criteria to students with disabilities according to state guidelines. IEP teams may not modify Criterion 1 for reclassification, which requires meeting the SBE-adopted Overall PL 4 on the Summative ELPAC or PL 3 on the Summative Alternate ELPAC. This allows for all students to be held to a consistent and rigorous standard in demonstrating ELP in order to be exited from EL services.

Ideally, this should be done as early as possible, as soon as one to two summative test administrations, or as soon as there is reasonable evidence that it is a student's disability that prohibits English Language Acquisition.

~~¶~~

~~¶~~

~~¶~~

~~The Administrative Designee and/or Case Manager should include the rationale for reclassification.~~

~~Avoid:~~

- ~~• Focusing on family history. Instead, focus on assessment results and the impact of the disability.~~

- Including parents' wishes for reclassification or opinion on the validity of ELPAC scores or current English learner status. Instead, focus on the needs of the child.¶
- Basing recommendation for changing EL status on the belief of the parent(s) or team members that the EL status or Home Language Survey was erroneous to begin with and, therefore the student should never have been classified as EL. This is a matter outside of the scope of the IEP team and cannot be the basis for the team's recommendation for reclassification.¶



If the recommendation for reclassification is taking place as part of the student's initial IEP or annual review, then the IEP Team Reclassification Determination Worksheet is to be completed, along with all other pages of the IEP are completed to reflect the recommendation that the student is to be reclassified as RFEP (Reclassified Fluent English Proficient). If the recommendation for reclassification occurs between annual reviews, then in addition to completing the IEP Team Reclassification Determination Worksheet, IEP Team Recommendation for Reclassification of Special Education English Learners form, an IEP Amendment meeting and form must also be completed. All applicable staff should be a part of the reclassification meeting. Because this is an IEP team recommendation, the parents, the EL Assessment Coordinator, and all applicable staff should be a part of the reclassification meeting and decision. If the team decides to reclassify the student as RFEP, the EL Assessment Coordinator Special Education teacher or Case Manager will include a copy of the IEP Team Reclassification Determination Worksheet in the student's file. IEP Team Recommendation for Reclassification of Special Education English Learners form in the EL student's file, will update the EL Master Tracking Spreadsheet and follow all other reclassification procedures. These procedures include notifying the The EL Assessment Coordinator of the The Operations assessment and Accountability department will then follow the regular reclassification process to update the student's English Language Acquisition Status and notify all parties involved.. of the reclassification. Because this is an IEP team recommendation, the parents and the EL Assessment Coordinator must be part of the decision. If the reclassification is not agreed upon, the IEP team must ensure that the IEP continues to address the needs of the student who remains classified as an English learning student.

ELD Program Options

Personalized English Language Mainstream Program

English Learners in Sage Oak Charter Schools participate in an English Language Mainstream Program. This instructional program is designed to promote the acquisition of high levels of English

language proficiency and access to the core curriculum. In the mainstream English program, English is the language of instruction for all subjects with no primary language support. Students in an English Language Mainstream Program will be supported by their instructors through the use of SDAIE strategies. Students may also be concurrently enrolled in an ELD support class. English Learners in the English Language Mainstream Program will receive ELD instruction until they are reclassified as English proficient. In the English Language Mainstream Program of Sage Oak Charter Schools:

- Core instruction in language arts, math, science, and social science is taught in English using charter-approved curriculum and SDAIE methodology
- English Language Learners receive both integrated and designated ELD instruction which addresses the ELD standards in listening, speaking, reading and writing.
- Teachers working with EL students will be appropriately authorized, i.e., CLAD or equivalent.

Parent Notification of Programs

All parents of English Learners, regardless of proficiency, must be notified at initial enrollment and annually, in writing, of program placement of their children and must also be provided with a description of our program, including educational materials used in this program and their entitlement to request a waiver. The information must be provided in a language the parents understand within 30 days of enrollment.

Staffing

Staffing Authorizations

Under the management of the Director of Human Resources, Sage Oak Charter Schools takes an active role in the recruitment and staffing of authorized personnel for all English Learner programs and makes it a priority to hire CLAD or equivalent teachers. Teachers providing instruction in a Mainstream English Program shall be authorized to provide appropriate core content and ELD instruction. This is achieved via a CLAD or equivalent authorization.

Teachers who are not currently authorized but who are working with English Learners, shall be required to sign a memorandum of understanding stipulating that they will be actively participating in professional development designed to secure appropriate authorization within two years. The HR Department will then monitor attendance at professional development activities to ensure that such teachers remain on track to complete the necessary training for their authorizations.

Access to Core Curriculum

All English learners are provided quality, standards-based, rigorous curriculum and instruction in all CORE content areas as well as Advanced Placement courses, enrichment classes, and college and career programs. Integrated ELD instruction and strategies are consistently implemented to meet the individual needs of each English learner.

Specially Designed Academic Instruction in English (SDAIE)

SDAIE is a methodology used to make subject area content, delivered in English, comprehensible in order to meet the needs of limited-English-proficient pupils. Academic instruction through English is modified to meet the student's level of language proficiency. Teachers use specialized strategies that enable students to understand, participate in, and access the core curriculum. (EC 44253.2[b]).

English as the Language of Instruction

In accordance with California Education Code Section 305, all students in California public schools, including those enrolled in independent study programs, must be taught in English for all core academic areas. This is to include, but not limited to, English Language Arts, Math, History, and Science. This requirement ensures that all students, including English Learners, receive equitable access to instruction that promotes English language proficiency and academic success.

To meet this requirement:

- Instruction in all subjects will be provided in English, including synchronous and asynchronous components of the independent study program.
- Participation in synchronous and/or asynchronous instruction for all core academic areas in English is mandatory for all English Learner students, regardless of their English Learner status or participation in an ELD program, as this is essential for meaningful interaction and mastery of academic content.
- Opting out of this instruction is not permitted, as it is integral to ensuring compliance with state law and the successful implementation of Sage Oak's academic program.

This policy ensures that Sage Oak Charter Schools uphold the legal and educational responsibilities to all students, fostering an environment where English language acquisition and academic achievement are prioritized.

English Language Development

English Language Development (ELD) Standards

Sage Oak's English Language Development program is grounded in research and aligned to the 2014 California State ELA/ELD Framework. The ELA/ELD Framework helps define how the California English Language Arts and English Language Development standards will be taught and assessed. Both sets of standards represent the skills, knowledge, and abilities English learners must possess in order to become 21st Century and College and Career Ready and describe what students should know and be able to do at each of the five levels of English proficiency. Sage Oak is committed to implementing the ELA/ELD Framework, the California State Standards, and English Language Development Standards through its adopted ELA/ELD programs. As stated in the ELA/ELD Framework Executive Summary: "The purpose of ELD instruction is to amplify (magnify and make clear) areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. The standards help teachers support EL students to interact meaningfully with others and complex texts, engage in and learn through intellectually challenging tasks across the content areas, develop academic English, and develop awareness about how English works so that they can use it intentionally and purposefully."

The California ELD standards are organized into three parts.

Part I: Interacting in Meaningful Ways

English learners participate in meaningful and intellectually challenging tasks in three ways:

- Collaboratively, by communicating with others about social and academic topics.
- Interpretively, by understanding written and spoken information.
- Productively, by writing or presenting to explain ideas and information.

Part II: Learning About How English Works

English learners comprehend and produce academic texts in various content areas.

- English learners use language to create organized texts, expand and enrich ideas, and connect and condense ideas.

Part III: Using Foundational Literacy Skills.

This section emphasizes how all teachers play a crucial role in developing the literacy of ELs.

- English learners at all grades require specialized instruction to learn foundational literacy skills based on their age, previous literacy, and educational experiences

The CA ELD Standards are aligned to the CA CCSS for ELA/Literacy as they magnify and make clear areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. They promote the notion of supporting English Learners to develop awareness that different languages and variations of English exist and that their home languages and cultures are valuable resources in their own right and useful for building proficiency in English.

Key Themes of ELA/Literacy and ELD Instruction

Meaning Making

Meaning making is at the heart of ELA/literacy and ELD instruction. It is the central purpose for interacting with text, producing text, engaging in research, participating in discussion, and giving presentations. It is the reason for learning foundational skills and for expanding language. Meaning making includes literal understanding but is not confined to it at any grade or with any student. Inference making and critical reading, writing, and listening are given substantial and explicit attention in every discipline. Among the contributors to meaning making are language, knowledge, motivation, and, in the case of reading and writing, the ability to recognize printed words and use the alphabetic code to express ideas.

Language Development

Language is the cornerstone of literacy and learning. It is with and through language that students learn, think, and express information, ideas, perspectives, and questions. The strands of the CA CCSS for ELA/ Literacy—Reading, Writing, Speaking and Listening, and Language—all have language at the core, as do the parts of the CA ELD Standards—Interacting in Meaningful Ways, Learning About How English Works, and Using Foundational Literacy Skills. Students enrich their language as they read, write, speak, listen, interact, and learn about language. The foundational skills provide access to written language.

Effective Expression

Each strand of the CA CCSS for ELA/Literacy and each part of the CA ELD Standards includes attention to effective expression. Students learn to examine the author's craft as they read, analyzing how authors use language, text structure, and images to convey information, influence their readers, and evoke responses. Students learn to effectively express themselves as writers, discussion partners, and presenters, and they use digital media and visual displays to enhance their expression. They gain command over written and spoken English conventions, and they learn to communicate in ways appropriate for the context and task.

Content Knowledge

Content knowledge is a powerful contributor to the comprehension of text. It also undergirds the ability to write effective opinions/arguments, narratives, and explanatory/informational text, engage in meaningful discussions; and present ideas and information to others. It contributes significantly to language development, and it is fundamental to learning about how English works. Both sets of standards ensure that students can learn from informational texts and can share their knowledge as writers and speakers. An organized independent reading program contributes to knowledge. Content knowledge has a powerful reciprocal relationship with the development of literacy and language.

Foundational Skills

Acquisition of the foundational skills enables students to independently read and use written language to learn about the world and themselves, experience extraordinary and diverse works of literary fiction and nonfiction, and share their knowledge, ideas, stories, and perspectives with others. Students who know how to decode and develop automaticity with an increasing number of words are best positioned to make significant strides in meaning making, language development, effective expression, and content knowledge. At the same time, attention to those themes provides the very reason for learning about the alphabetic code and propels progress in the foundational skills.

Charter schools enrolling English Learners have a dual obligation, as do all LEAs, to provide a program for EL students designed to overcome language barriers and provide access to the core curriculum (*Castañeda v. Pickard* 648 F.2d 989, [5th Cir. 1981]). The CDE recognizes that both services, including classified ELD, must be an integral part of a comprehensive program for every English Learner.

The ability to read, write, and communicate with competence and confidence in English across a range of personal and academic contexts expands students' opportunities for career and college success, full and wise participation in a democratic society and global economy, and achievement

of their personal aspirations. Moreover, literacy and language skills provide individuals with access to extraordinary and powerful literature that widens perspectives, illuminates the human experience, and deepens understandings of self and others.

Designated English Language Development

Sage Oak's English language development program is designed to support the academic success and reclassification of English learners. The teacher implements techniques, methodology, and supplemental curriculum designated to teach ELs explicitly about the English language, academic vocabulary, and develop their English language proficiency in all four language domains: speaking, listening, reading, and writing. Sage Oak Charter Schools will create a personalized ELD instruction pathway geared to the student's level of English proficiency.

Designated ELD instruction and individual academic support are provided to English learners during dedicated times each week. Students are grouped for designated ELD by their English language proficiency levels (Emerging, Expanding, Bridging). However, the three levels of language proficiency are not static but rather represent a continuum of language learning and decisions about grouping will be made in the student's best interest. Teachers use the student's production and interpretation of the English language to choose appropriate learning supports, inform instructional decisions, and keep track of academic progress.

Instructional Materials to Support the CA CCSS for ELA/Literacy and CA ELD Standards

The Designated ELD curriculum and materials were chosen specifically to address the varied cultural and language backgrounds our English learners possess, enabling learners and educators to celebrate their own cultures and everyday lived experiences while also learning about those of others. It includes authentic content from around the world to develop the student's understanding of different cultures and viewpoints of others around the globe.

The State Board of Education adopts instructional materials for use by students in kindergarten through grade eight. LEAs- school districts, charter schools, and county offices of education- ARE NOT required to purchase state-adopted instructional materials according to EC Section 60210(a). If an LEA chooses to use non-adopted materials, it has the responsibility to adopt materials that best meet the needs of its students and to conduct its own evaluation of instructional materials. The review must include a majority of classroom teachers from that content area or grade-level ED Section 60210(c). EC Section 60002 requires the LEA to promote the involvement of parents and other members of the community in the selection of instructional materials, in addition to teacher involvement.

Professional Learning

Professional Development

Sage Oak Charter Schools provides ongoing professional development opportunities to all teachers and staff working with English Learners. The goal of this training is to help educators acquire specific skills needed to work with English Learners in the areas of ELD instruction, comprehensible core content instruction, program designs, curriculum expectations, and processes and services for English Learners. Training should also focus on multiculturalism and up-to-date research and pedagogy for English Learners to receive equitable and accessible support and opportunities to achieve and reach their goals.

Staff development opportunities include, but are not limited to, the following:

- ELD Standards
- ELPAC assessment and identification levels
- ELD strategies and instruction
- SDAIE strategies and instruction
- Differentiated instruction

Ellevation Database Training

- ~~EL Master Tracking Spreadsheet and EL Cumulative file training~~
- Shared Best Practices

To ensure that all staff working with parents of EL students are appropriately trained, training participation and completion are documented.

Family & School Partnerships

Sage Oak Charter Schools seeks to promote positive collaboration between parents and the school by promoting open communication and developing a working partnership between parents and the schools to provide equal access to education for all students. Parents of English Learners (EL) are encouraged to participate in their children's education and be active in assisting their children in attaining English proficiency, achieving academically at high levels, and meeting state standards. Parents are given information about the English Learner Advisory Committee (ELAC) and are encouraged to participate.

English Learner Advisory Committee (ELAC)

An English Learner Advisory Committee is a school-level committee composed of parents, staff, and community members designated to advise school officials on English learner programs and services and is required for any California public school with 21 or more English Learners. The ELAC shall be responsible for the following tasks:

- Advising the principal and staff in the development of a site plan for English learners.
- Assisting in the development of the schoolwide needs assessment.
- Ways to make parents aware of the importance of regular school attendance.
- Assisting in the evaluation of the English Learner Master Plan.
- Each ELAC shall have the opportunity to select at least one member to the District English Learner Advisory Committee (DELAC). Districts with 31 or more ELACs may use a system of proportional or regional representation. Parents or guardians of English Learners shall constitute at least the same percentage of the ELAC membership as their children represent the student body. The parents or guardians of English Learners shall elect the parent members of ELAC. Parents or guardians of English Learners shall be provided the opportunity to vote in the election. ELAC members shall receive training materials and training that will assist them in carrying out their required advisory responsibilities. Training shall be planned in full consultation with committee members, and funds from appropriate resources may be used to meet the costs of providing the training including costs associated with the attendance of members at training sessions. ELAC meeting agendas will be posted on the school website.

ELAC Membership

All parents/guardians of ELs and recently RFEPed students (within the academic school year) have an opportunity to participate as members of the committee. Members receive training and materials to assist members in carrying out their legal responsibilities in alignment with California Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a) and California Code of Regulations, Title 5, Section 11308.

The ELAC is composed of the following:

- Principal or designee
- Parents of EL and students redesignated (RFEP) within the academic school year.
- School staff

Assessment and Student Program Monitoring

Accountability and Evaluation

California has been working for the past several years to improve education at the state level. The goal is to increase the academic achievement of all students by creating a coordinated system through the use of content and performance standards. In response to statewide accountability reform, Sage Oak Charter Schools provides clearly defined standards and expectations for student learning. It has a primary goal that all students will meet the charter's academic content and performance standards.

Through the Sage Oak Charter Schools assessment program, the assessment and accountability department carefully considers what students are asked to do, how student performance is evaluated, and how evaluation results are used. The assessment program is responsive to the developmental differences, linguistic differences, and special needs of English Learners. Through multiple forms of assessment, Sage Oak Charter Schools is able to determine to what degree English Learners are achieving English proficiency and meeting academic achievement goals.

Sage Oak Charter Schools' assessment practices with respect to English Learners are designed to:

- Assess and monitor language development by time in the program
- Assess academic achievement in meeting grade level core standards
- Assess progress of ELs achieving ELD grade level standards
- Ensure learning opportunities in reading and writing are provided
- Monitor that targeted interventions are working

Assessment data is compiled, analyzed and reported by Sage Oak Charter Schools leads and Data and Assessment Department. Their reports are then analyzed by the school leadership team, to produce a set of suggested program modifications, which are then shared with the Board of Directors, teachers, and EL parents for additional input and approval.

Sage Oak Charter Schools annually determines the number and percentage of EL students who have become RFEP through ongoing uploads of information to CALPADS. CALPADS reports the actual count of EL, IFEP, and RFEP students during the calendar year as well as the number of teachers providing and authorized to provide appropriate instruction for English Learners.

Monitoring of Long-Term English Learners

Long-term English Learners (LTEL) are defined as students who are in grades 6 to 12, have been enrolled in U.S. schools for more than six years, have remained at the same level of English for two or

more years as measured by the state's annual proficiency exam, and have scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

ELs with little or no English proficiency need more time than native-English speakers to meet grade-level benchmarks in English and state-mandated testing targets. Schools must monitor student progress to ensure that additional and appropriate learning opportunities are provided in English language development and in reading, writing, and other academic content areas in order to close the achievement gap.

Benchmark assessments, course grades, and the CAASPP assessments, along with the number of years a student has been classified as an EL student, are used to determine if a student is making the appropriate movement toward becoming RFEP.

If, despite the implementation of school-wide interventions and supports, a student is still not making "adequate progress," the school will hold a Student Study Team meeting to discuss the lack of progress. The SST team will plan further evaluation and intervention to support students who are not meeting interim benchmarks. Interventions will be noted and filed on the EL Master Tracking Spreadsheet, in their cumulative folder, and/or in a collaborative Google document. Additionally, parents will be notified annually if their student is at risk of becoming an LTEL or has been classified as an LTEL.

Meeting the Needs of Long-Term English Learners

The National Education Association's Publication: Meeting the Unique Needs of Long-Term English Language Learners, A Guide for Educators provides valuable research-based information and best practices to guide schools and LEAs in supporting students at risk for becoming Long Term English Learners (LTEL).

Elementary School Strategies and Programs that Prevent the Creation of Long-Term English Language Learners:

The trajectory of a Long Term English Language Learner begins in elementary school. Taking the necessary steps early enough can help prevent an entire new generation of long-term ELL students. Successful elementary school programs offer high-quality language development programs and strategies that are consistent across grade levels.

- English Language Development/English as a Second Language: Dedicated, daily, and standards-based ELD/ESL programs address the specific needs of students at each fluency level and support instruction with quality materials that focus on all four language

domains—with a major emphasis on building a strong oral language foundation; using language for interaction and meaning-making; and developing complex, precise, and academic language.

- Home language development: Programs that develop students' home language (oral and literacy) to threshold levels are a strong foundation for developing English literacy and academic success (at least through third grade, more powerfully through fifth grade, and optimally, ongoing throughout a student's education). Teaching students to read in their first language promotes higher levels of reading achievement in English and provides students with the benefits of bilingualism.
- Use curriculum, instruction, and strategies. Use resources that promote transfer between English and the home language.
- Enriched oral language development: Emphasize oral language throughout the curriculum.
- Modified instructional strategies and supplemental materials provide access to academic content.
- Program coherence and consistency: Provide coherence and consistency of program across grades, including, wherever possible, articulation and alignment with preschool.
- High-quality literature: Provide students/LTEs with exposure to high-quality literature and complex and expressive language.

Seven Basic Principles for Meeting the Needs of Middle and High School LTEs

Seven basic principles lie at the heart of successfully educating middle and high school Long Term English Language Learners:

1. Urgency: Focus urgently on accelerating LTE progress towards attaining English proficiency and closing academic gaps.
2. Distinct needs: Recognize that the needs of LTEs are distinct and cannot adequately be addressed within a "struggling reader" paradigm or a generic "English Language Learner" approach, but require an explicit LTE approach.
3. Language, literacy, and academics: Provide LTEs with language development, literacy development, and a program that addresses the academic gaps they have accrued.
4. Home language: Affirm the crucial role of home language in a student's life and learning, and provide home language development whenever possible.
5. Three R's: rigor, relevance, and relationships: Provide LTEs with rigorous and relevant curriculum and relationships with supportive adults (along with the supports to succeed).
6. Integration: End the ESL ghetto, cease the sink-or-swim approach, and provide maximum integration without sacrificing access to LTE supports.
7. Active engagement: Invite, support, and insist that LTEs become active participants in their own education.

Instructional Support System

The Charter School is committed to closing the achievement gap for all students, including English Learners. The Instructional Support System for English Learners is a part of the standards-based system of instruction, assessment, monitoring, and evaluation provided for all students.

The Instructional Support System for English Learners is designed to provide the mechanisms for recording EL achievement, detecting academic deficits, and monitoring the effectiveness of interventions.

To ensure all students will catch up to their grade-level peers, we have the following essential elements:

1. All English Learners are held to the same Charter-adopted curriculum and performance standards in the core curricular areas as all other students.
2. All English Learners participate in a program of curriculum and instruction that is aligned to state content standards and designed to reduce all language barriers. The English Learner program is designed to ensure that participating EL students acquire English and learn grade-level academic content simultaneously and to the greatest extent possible. Components of this program include ELD, grade-level core curriculum, and assessment.
3. The Instructional Support System for English Learners includes an assessment and reporting process of student academic achievement for all students, including English Learners. The use of multiple measures, the disaggregating of student achievement data, and the regular reporting of student achievement data are integral components of the Charter assessment and reporting process and are recorded in the Ellevation platform. ~~on the student's individual EL card.~~
4. The performance of EL and RFEP students is monitored:
 - a. Students identified in need of interventions are provided the appropriate intervention aimed at filling in gaps in content knowledge so that ELs can gain full access to grade-level core content instruction in a reasonable period of time.
 - b. Any areas of deficiency are noted, and appropriate modifications in instructional programs or student support systems are identified.

The Instructional Support System described here for ELs is based on five (5) essential elements that include adopted curriculum standards; curriculum and instruction aligned with adopted standards; assessment and reporting; charter and site level monitoring and intervention; and program evaluation.

1. **Adopted Curriculum Standards:** In Sage Oak Charter Schools each English Learner is held to the same charter-adopted curriculum standards in the core curricular areas of English Language Arts, math, history-social science, and science as every other charter student. In addition, each EL student is expected to demonstrate mastery of the adopted ELD standards.
2. **Curriculum and Instruction Aligned with Adopted Standards:** Sage Oak Charter Schools supports each English Learner in his/her appropriate level of language development in the core courses. Each English Learner participates in an instructional program with state-adopted materials that are aligned with charter and state standards. Through articulation meetings, staff members discuss and interpret data on English Learner students to address the issues surrounding English Learners who may have been in the educational system for some time and seem unable to move beyond this level.
3. **Assessment and Reporting:** Sage Oak Charter Schools administers all state-mandated examinations. ELPAC assessments and ongoing multiple measures are used to assess student proficiency. Results are entered into the EL Master Tracking Spreadsheet for instructional planning and monitoring. Overall, student results are shared with the CEO and governing board.
4. **Monitoring and Intervention:** English Learner's assessment results are recorded on the EL Master Tracking Spreadsheet. The results are monitored to evaluate student learning in order to inform instruction and provide interventions as needed. When, according to ongoing assessments, students cannot meet interim expectations in academic content, they shall be referred by teachers and parents to receive academic interventions and support that enable them to overcome any academic deficits before they become irreparable. The intervention itself will directly target the identified academic need. Delivery of the intervention shall be monitored and documented. The effectiveness of the intervention will then be determined based on student work and assessments.
5. **Program Evaluation:** Sage Oak will conduct periodic evaluations of the effectiveness of its ELL program to determine if any modifications or improvements are required. This evaluation will include looking at the implementation of the ELL program, the effectiveness of the ELL program in meeting its goals for students (English language development and the ability to participate meaningfully in the educational program), and gathering appropriate input from knowledgeable persons and other stakeholders.

Note: When Special Education students, identified as ELs, are not making adequate progress, Special Education teachers must schedule an IEP meeting to discuss further interventions.

Monitoring of Reclassified Students

The school's Lead, teachers, parents, and the assessment Lead supervise the process of monitoring reclassified students. School staff will use the Smarter Balanced assessment, local multiple measure scores, and teacher assessments and observations to semi-annually monitor the progress of RFEP students for a period no less than four (4) years after reclassification. Student performance shall be reviewed at each progress reporting period. Those students found to be regressing in their academic performance will be referred to receive an academic intervention in the specific area of need. This monitoring of RFEP students is recorded ~~in the Ellevation platform.on each student's individual ELF card.~~

Coversheet

(Action) Approval of New 3155-SO Scholarship Program Policy

Section: XV. Policy Development
Item: A. (Action) Approval of New 3155-SO Scholarship Program Policy
Purpose: Vote
Submitted by:
Related Material: 3155-SO Scholarship Program Policy_6.12.2025.pdf

BACKGROUND:

The new Scholarship Program Policy establishes a formal framework for supporting graduating Sage Oak Charter Schools seniors who exemplify the values of service, accountability, a growth mindset, and excellence. The policy outlines the creation and management of a dedicated scholarship fund in compliance with IRS 501(c)(3) regulations, establishes structured donation management and tracking practices, and defines a transparent application and selection process. It also sets financial guidelines to ensure sustainability, including limitations on award amounts relative to donations received. Sage Oak's Community Outreach department is tasked with promoting the program and expanding donor engagement. Oversight is provided by the Superintendent or designee, with annual reporting to the Board. The policy will be periodically reviewed and amended to align with program growth and legal updates.

RECOMMENDATION:

It is recommended the Board approve the 3155-SO Scholarship Program Policy as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

BUSINESS/NON-INSTRUCTIONAL**3155-SO**

SCHOLARSHIP PROGRAM POLICY

Sage Oak Charter Schools (“SOCS” or the “Charter School”) has adopted this policy to establish the Student Scholarship Program to support the academic goals of graduating SOCS seniors who exemplify the Sage Oak core values of service, accountability, a growth mindset, and excellence. This structured and transparent policy ensures compliance with financial and legal requirements.

Objectives and Expectations

The program is designed to:

1. Enhance educational opportunities for high school seniors.
2. Maintain compliance with IRS regulations for SOCS’s 501(c)(3) status.
3. Establish sustainable and transparent scholarship practices.

Key Policy Areas

1. Establishment and Management of the Scholarship Fund
 - a. SOCS operates as a 501(c)(3) nonprofit with federal income tax exemptions for educational purposes. The advancement of education may take the form of grants, scholarships and awards, promotion of the arts, humanities, and science, and job training.
 - b. Scholarship funds comply with IRS regulations, including Revenue Rule 77-380, permitting grants for educational advancement.
 - c. SOCS is authorized to create a donor-restricted scholarship fund with contributions specifically designated for scholarships.
 - d. Scholarship program revenue will not exceed 33% of SOCS’s total revenue to maintain tax exemption.
2. Donation Plan and Tax Compliance
 - a. Cash (check) donations will be managed by the Business Services department and deposited into a dedicated scholarship fund.
 - b. Donors will be provided with information regarding the tax-deductible nature of their contributions and how their donations align with Sage Oak’s mission.
 - c. The scholarship fund will be fully accessible and reviewed during the annual fiscal audit to ensure transparency and compliance.
 - d. All contributions will be documented with details on the type, donor, and intended use.
 - e. In-kind donations will be assessed for alignment with SOCS’s mission and nonprofit compliance.
 - f. Standardized gift-acknowledgement letters will be sent to donors in a timely manner.
3. Application and Evaluation Process
 - a. A structured application will be used to communicate clear timelines for

BUSINESS/NON-INSTRUCTIONAL

3155-SO

SCHOLARSHIP PROGRAM POLICY

- submission, review, and award notification.
- b. A selection committee of impartial committee members with no personal or financial conflict will evaluate applicants using a defined rubric to ensure fairness.
- c. Periodic evaluations will be done to enhance application and selection processes to ensure continuous improvement of the program.
- 4. Scholarship Criteria and Allocation
 - a. A selection process will be used to make awards through an impartial, transparent process detailed for each award.
 - b. A financial model will be used to support the long-term impact of gifts, whereby gifts that exceed the amounts identified for annual awards will roll over to future fiscal periods. The scholarship fund will not make awards in amounts greater than the sum of the amounts gifted.
- 5. Outreach and Collaboration
 - a. SOCS's Community Outreach department will build partnerships and increase visibility for the scholarship program.
 - b. The Community Outreach department will take strategic initiatives to raise donor awareness and promote program engagement.
 - c. The Community Outreach department will use collaboration involving principals, academic staff, and external stakeholders to identify candidates and refine goals.
 - d. The Community Outreach department will solicit donations from vendors, community members, and other benefactors for donations to the program.

Implementation and Oversight

- 1. The SOCS Superintendent or designee oversees implementation, donor relations, and compliance tracking.
- 2. An annual report to the Board may include updates on program performance, donor engagement, and financial status.

Review and Amendment

The SOCS Board of Directors will review this policy periodically to reflect program growth, legal updates, and organizational priorities.

Coversheet

(Hearing) 2025-2026 Local Control and Accountability Plans (LCAP) and Local Performance Indicator Self-Reflection Reports, Presented by Jodi Cope, Director of Operations & Accountability

Section: XVI. Public Hearing
Item: A. (Hearing) 2025-2026 Local Control and Accountability Plans (LCAP) and Local Performance Indicator Self-Reflection Reports, Presented by Jodi Cope, Director of Operations & Accountability
Purpose: Discuss
Submitted by:
Related Material:
2025-2026 Local Control and Accountability Plans (LCAP) and Local Indicators_Presentation_6.12.2025.pdf
2025-2026 LCAP Plan Summary - Sage Oak Charter School #1885_6.12.2025.pdf
2025-2026 LCAP Plan Summary - Sage Oak Charter School - Keppel #1886_6.12.2025.pdf
2025-2026 LCAP Plan Summary - Sage Oak Charter School - South #2051_6.12.2025.pdf
2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School #1885_6.12.2025.pdf
2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School - Keppel #1886_6.12.2025.pdf
2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School - South #2051_6.12.2025.pdf

BACKGROUND:

Sage Oak Charter Schools is excited to present the first reading of the Local Control and Accountability Plans (LCAP) for the 2025-2026 school year, covering all three of our charter schools. This session will also include a review of the Local Performance Indicator Self-Reflection reports for the California School Dashboard. The LCAPs offer a detailed three-year strategic plan aimed at enhancing student success in key priority areas defined by the state. These plans focus on providing tailored support to socio-economically disadvantaged students, foster youth, and English learners. The Budget Overview for Parents will also be shared, promoting transparency and accountability in our fiscal planning. The formal adoption of the LCAPs is set for the Board meeting on June 18, 2025.

RECOMMENDATION:

Education Code Section 47606.5 states that the Governing Board of a charter school shall hold a public hearing as part of the process to adopt the 2025-2026 Local Control and Accountability Plans (LCAP) for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051). The first reading of the 2025-2026 LCAPs and Local Performance Indicator Self-Reflection reports for the California School Dashboard will be presented during the hearing.



SAGE OAK
CHARTER SCHOOLS

Local Indicators & Local Control Accountability Plan JUNE 2025



LOCAL INDICATORS



PRIORITY 1

Basic Services & Conditions



PRIORITY 2

Implementation of
State Academic Standards



PRIORITY 3 & 5

Parent & Student Engagement



PRIORITY 4

Student Achievement



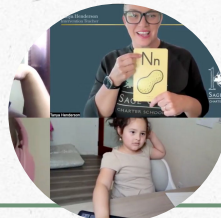
PRIORITY 6

School Climate



PRIORITY 7

Access to a Broad
Course of Study



PRIORITY 8

Student Outcomes

PRIORITY 1

Basic Services & Conditions



- Appropriately assigned teachers
- Access to curriculum aligned instructional materials
- Safe, clean and functional school facilities

PRIORITY 2

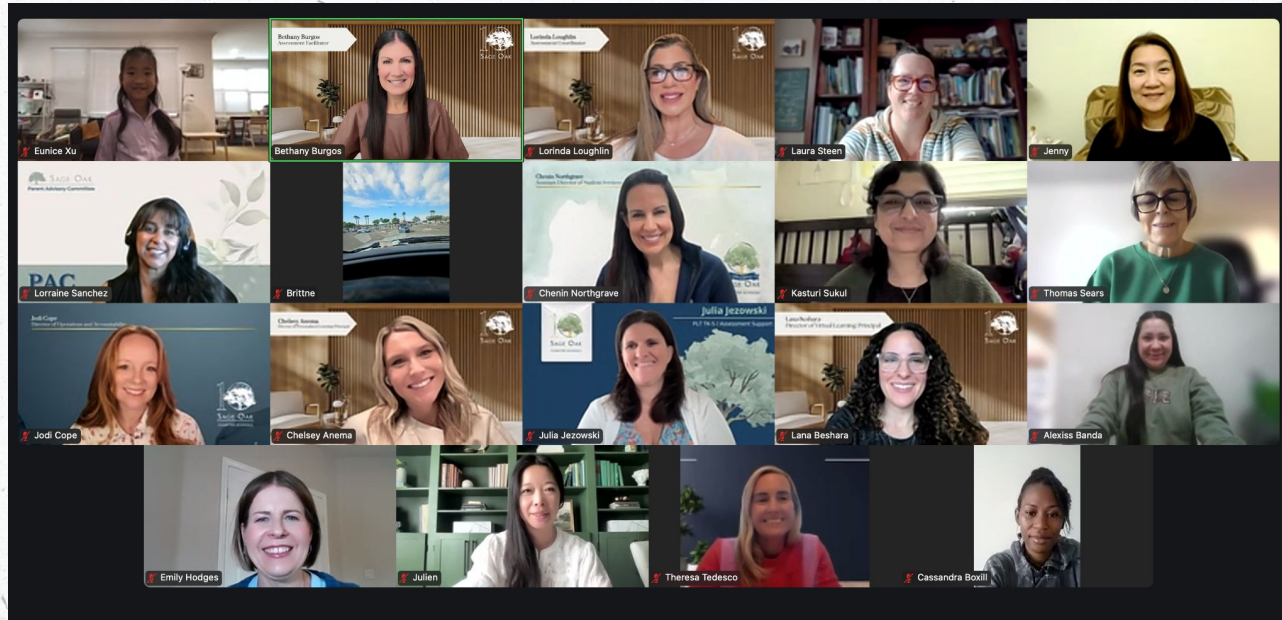
Implementation of State Academic Standards



- Core content areas
- World Languages, Visual and Performing Arts (VAPA)
- Career Technical Education (CTE)

PRIORITY 3 and 5

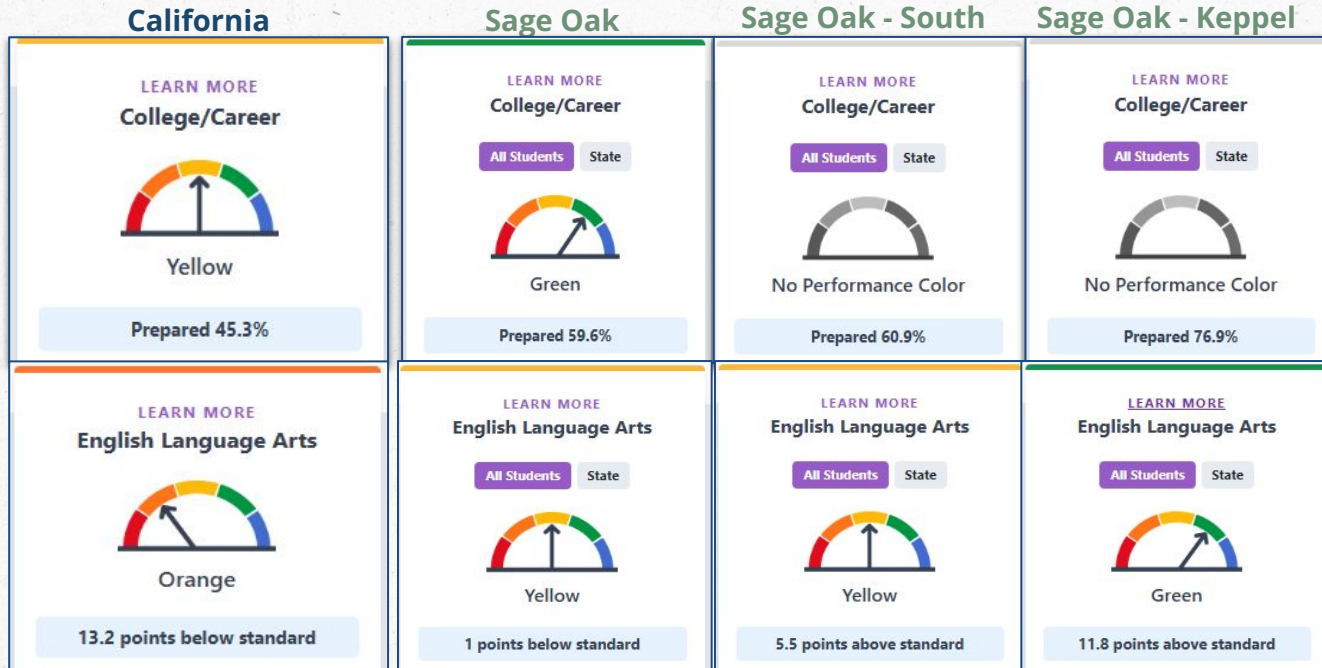
Parent & Student Engagement



- Building relationships with families
- Building partnerships for student outcomes
- Seeking input for decision-making

PRIORITY 4

Student Achievement



- Statewide assessments
- College and Career Readiness
- English Learners

PRIORITY 6

School Climate



- School safety
- Student connectedness
- Satisfaction with the school

PRIORITY 7

Access to a Broad Course of Study



- Students enrolled in a broad course of study
- Students have access to a broad course of study
- Identify barriers to access

PRIORITY 8

Student Outcomes



- Multi-tiered system of support
- Social and emotional resources
- Data-driven strategies

LCAP Annual Update

GOAL 1

Student Outcomes: Academic Achievement & College/Career Readiness



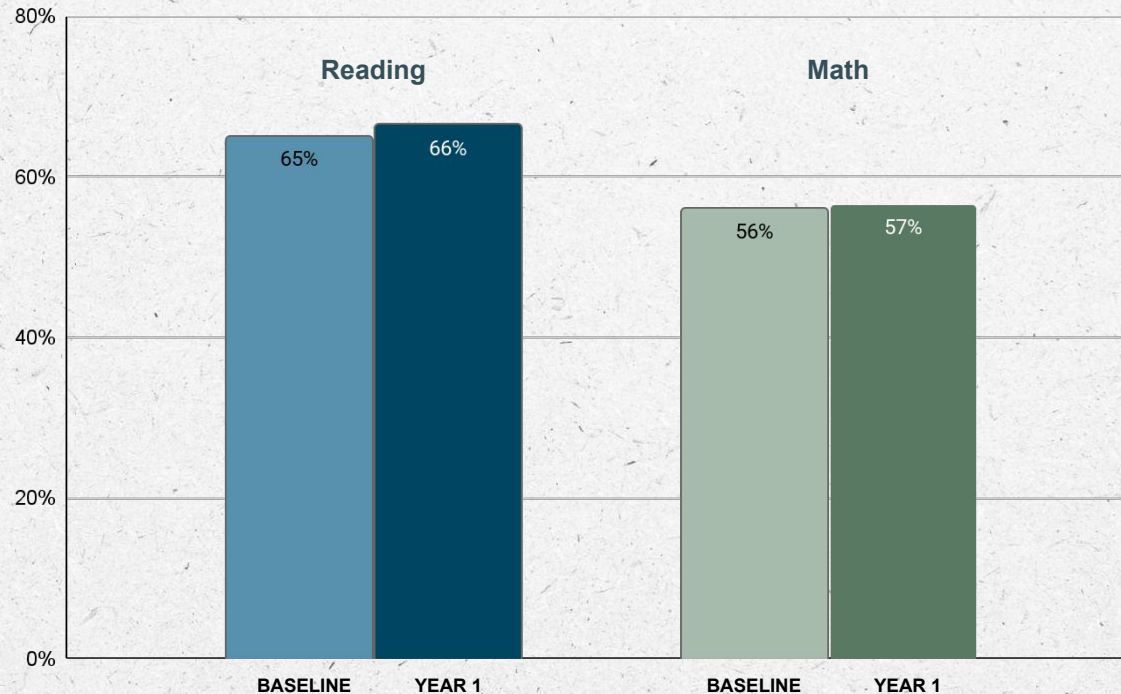
To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.

PRIORITIES ADDRESSED:

PRIORITIES 1-8

Goal 1: Action 2 Refine a personalized, data-informed multi-tiered system of support

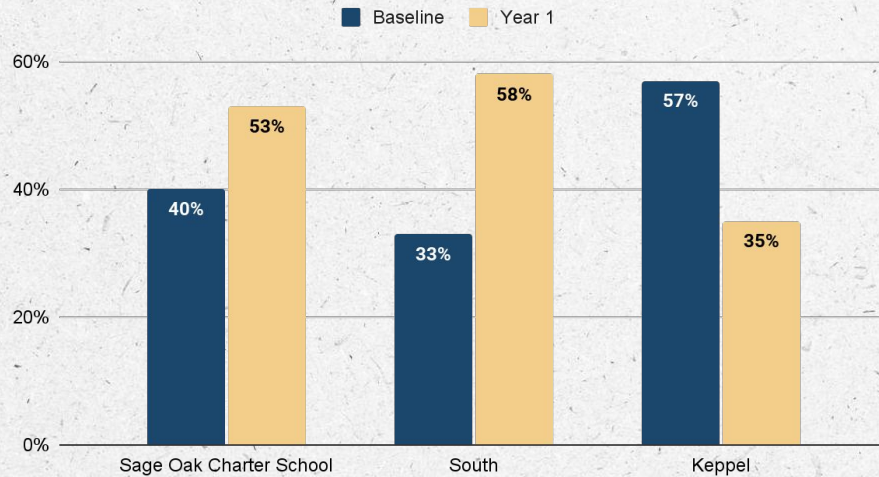
iReady -at or above grade level



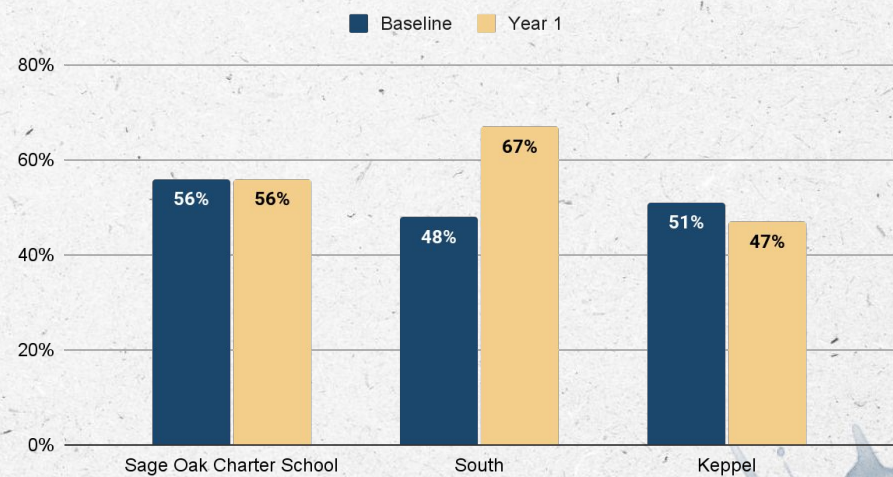
Goal 1: Action 2 Refine a personalized, data-informed multi-tiered system of support;

Growth in ELA and Math among intervention students

ELA



Math

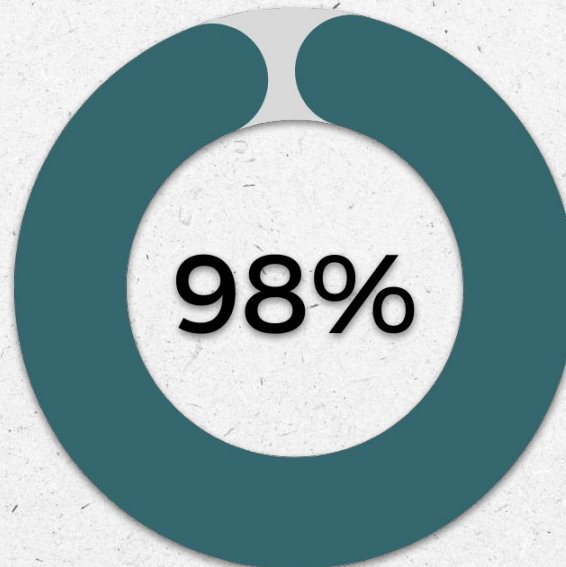




Goal 1: Action 4 Unified Articulation Process Development

Survey Question: Do you feel equipped to effectively communicate and prepare your students for the expectations and standards of the next grade level band, ie. elementary to middle school or middle school to high school?

Sage Oak Teachers

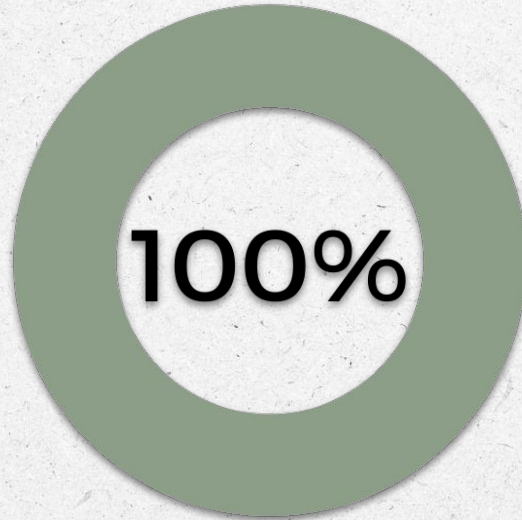




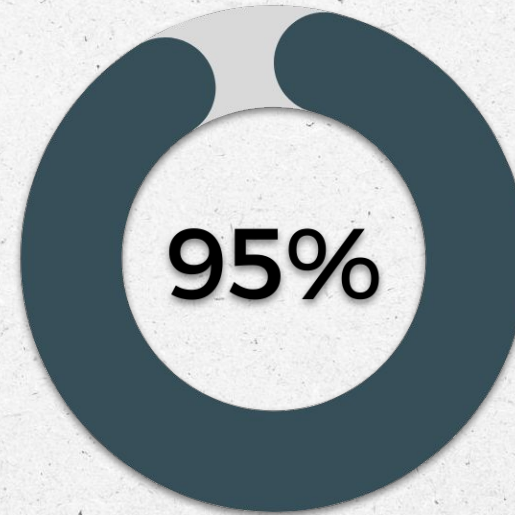
Goal 1: Action 5 Enhancing English Learner Proficiency and Reclassification

Survey Question: Does your family have access to a variety of resources that support your English learner student's achievement?

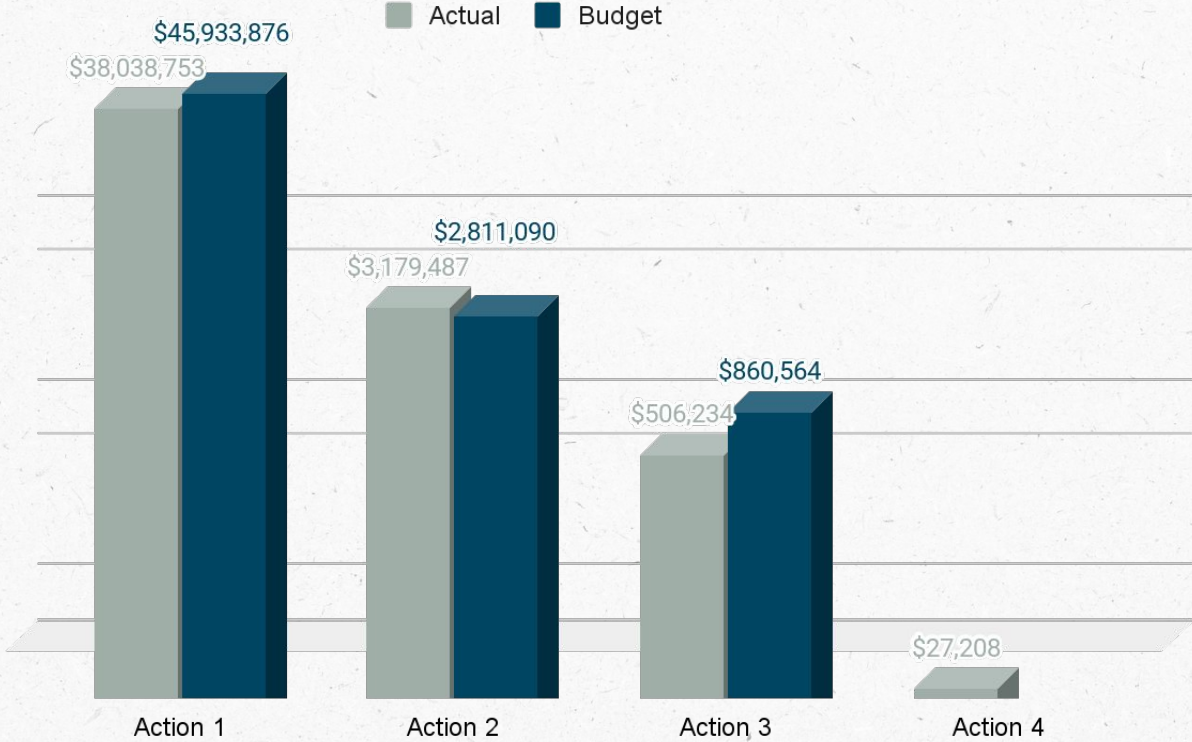
Sage Oak EL Parents



Sage Oak EL Students



Goal 1 Fiscal Sage Oak



TOTALS	\$41,751,682.19	\$49,605,530.00
--------	-----------------	-----------------

GOAL 2

Engagement: Fostering a Supportive and Engaging Learning Environment



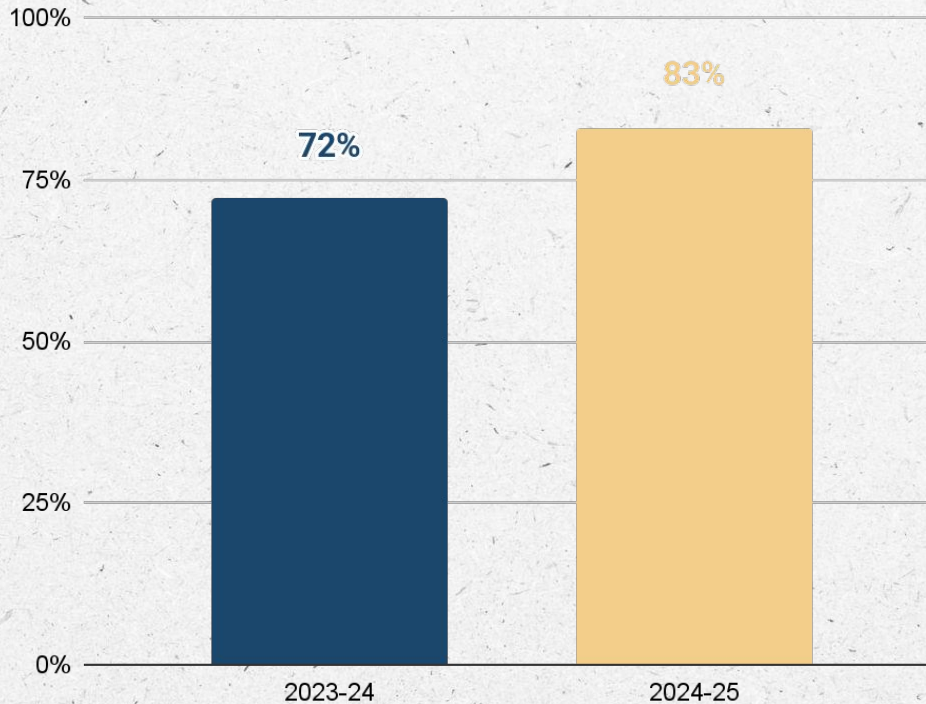
In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.

PRIORITIES ADDRESSED:

PRIORITIES 1, 3, 5, 6, 7, 8

Goal 2: Action 2 Development of professional growth pathways

Our retention has increased **more than 5%** from this time last year.





Goal 2: Action 2 Development of Professional Growth Pathways

Survey Question: Do you feel confident in your ability to implement new learning strategies, and do you intend to integrate them into their future practices? How?

"I feel that our growth mindset allows us to always be informed of what is best for our students. I intend on integrating these into future practices by using them in different department and committee meetings and professional development."



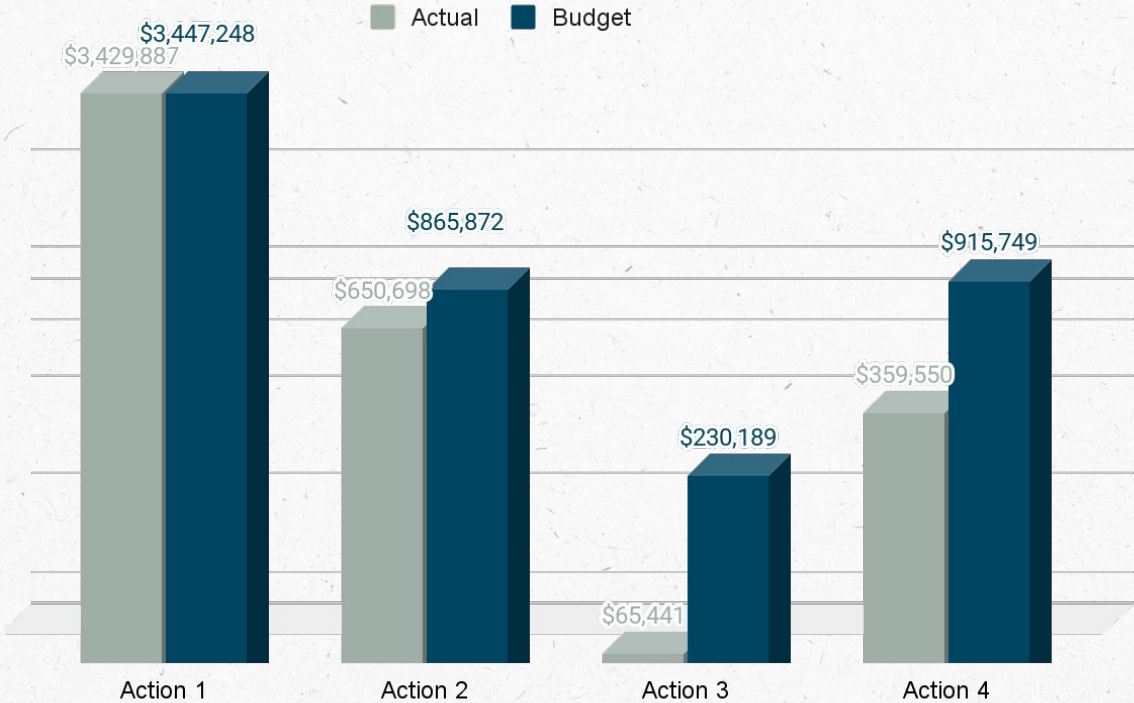


Goal 2: Action 3 Enhancement of Professional Development for Live Instruction

Survey Question: Do you believe you are well-equipped by Sage Oak to perform your job based on Professional development received this year?



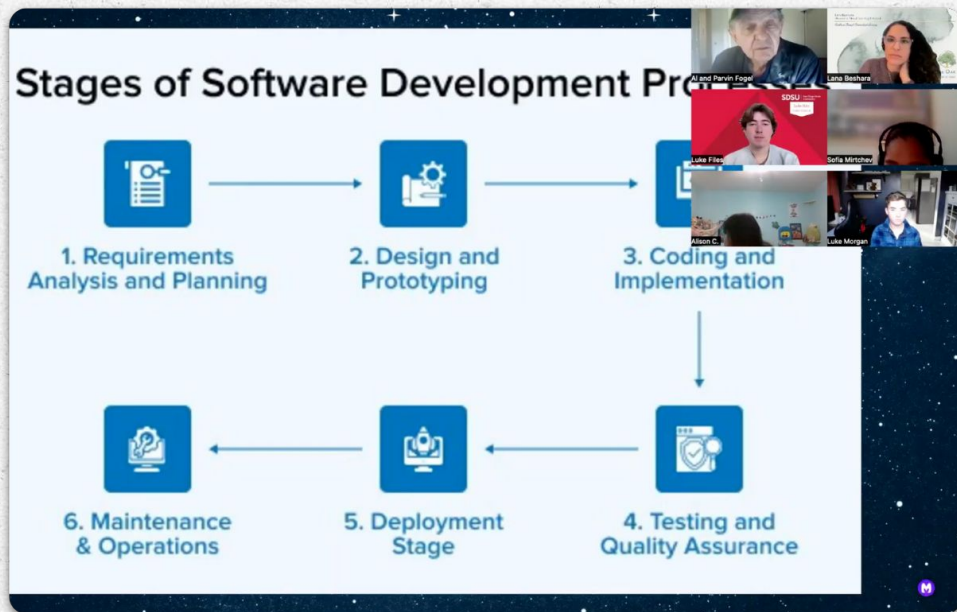
Goal 2 Fiscal - Sage Oak



TOTALS	\$4,505,576.44	\$5,459,058.00
--------	----------------	----------------

GOAL 3

Conditions of Learning: Efficient Operations with a Focus on Sustainability



Leverage technologies, specifically Artificial Intelligence, to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency.

PRIORITIES ADDRESSED:

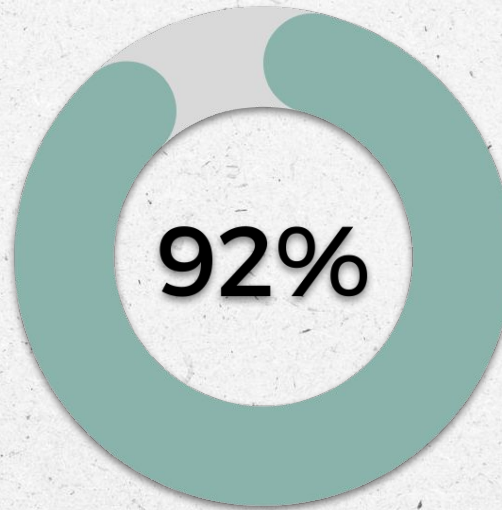
PRIORITIES 1, 2, 4, 7, 8



Goal 3: Action 1 Technology Optimization for Enhanced Operations

Survey Question: Have you experienced noticeable changes in your work efficiency and satisfaction after the implementation of new technology solutions? If so, how?

Leadership Team

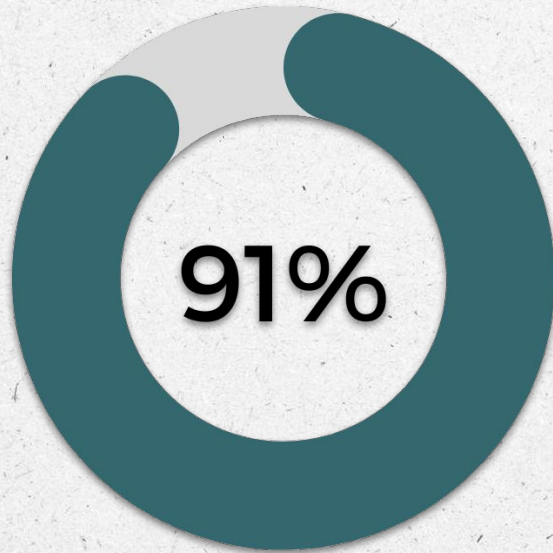




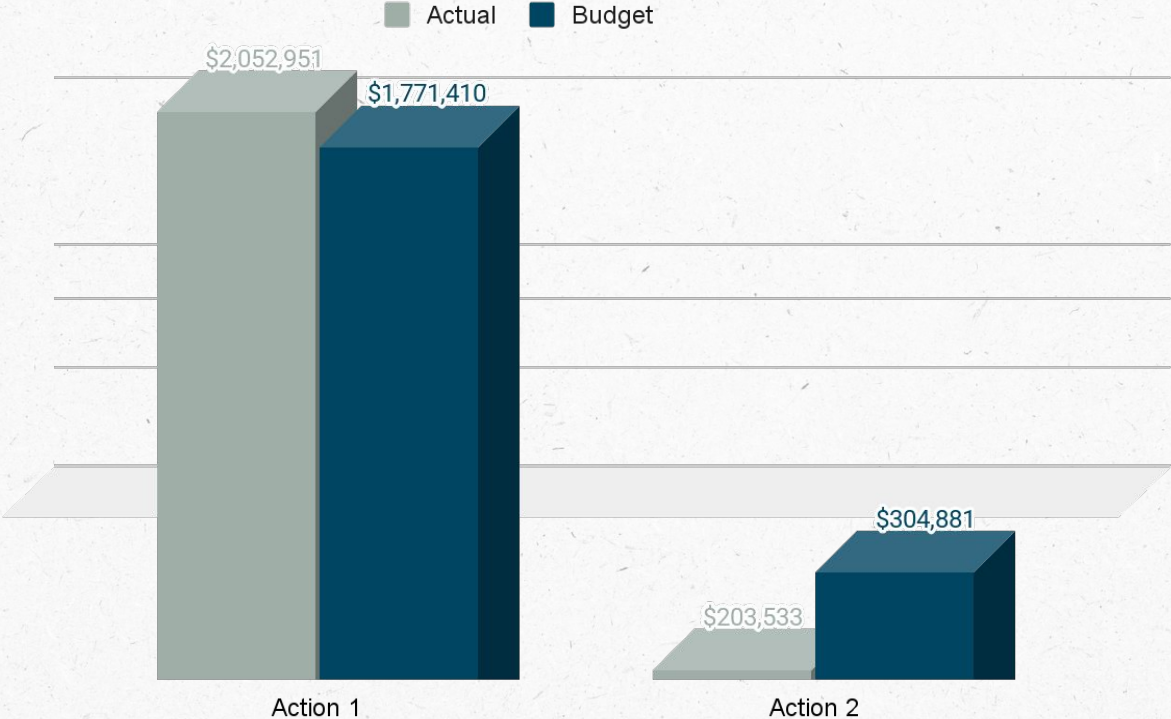
Goal 3: Action 2 AI-Driven Personalized Learning Implementation

Survey Question: Do you feel confident in your ability to use AI tools to improve learning outcomes for students, given the training you have received?

Sage Oak Teachers



Goal 3 Fiscal - Sage Oak



TOTALS	\$2,256,484.56	\$2,076,291.00
--------	----------------	----------------



Thank you!



LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School

CDS Code: 36-67736-0136069

School Year: 2025-26

LEA contact information:

Krista Woodgrift

Superintendent

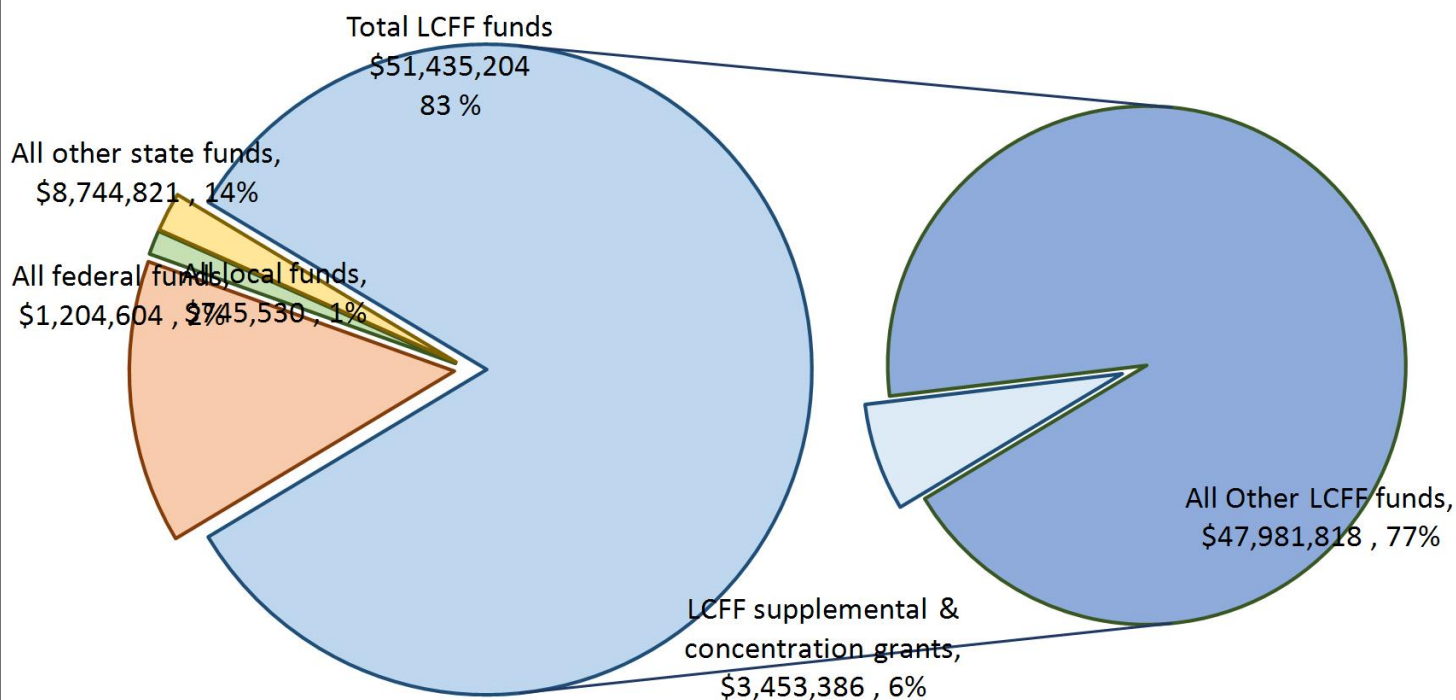
kwoodgrift@sageoak.education

888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2025-26 School Year

Projected Revenue by Fund Source

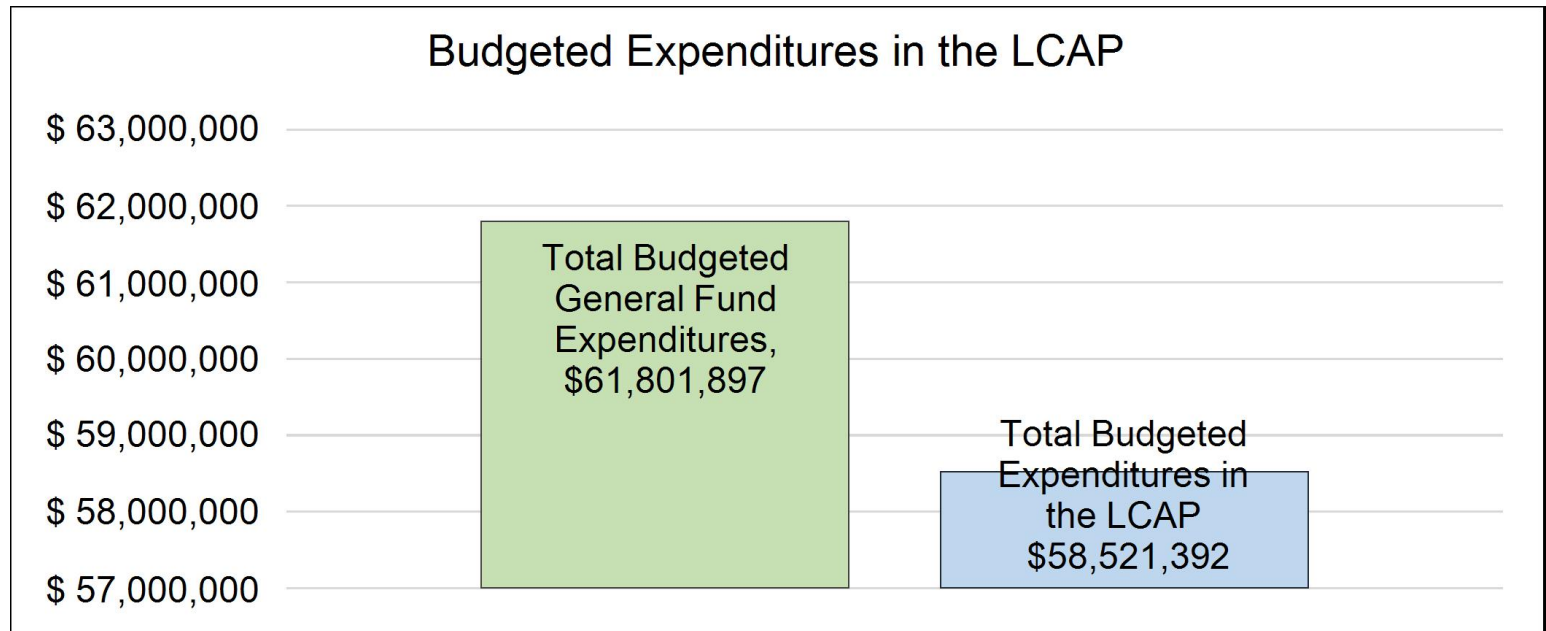


This chart shows the total general purpose revenue Sage Oak Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School is \$62,130,159, of which \$51,435,204 is Local Control Funding Formula (LCFF), \$8,744,821 is other state funds, \$745,530 is local funds, and \$1,204,604 is federal funds. Of the \$51,435,204 in LCFF Funds, \$3,453,386 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School plans to spend for 2025-26. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School plans to spend \$61,801,897 for the 2025-26 school year. Of that amount, \$58,521,392 is tied to actions/services in the LCAP and \$3,280,505 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

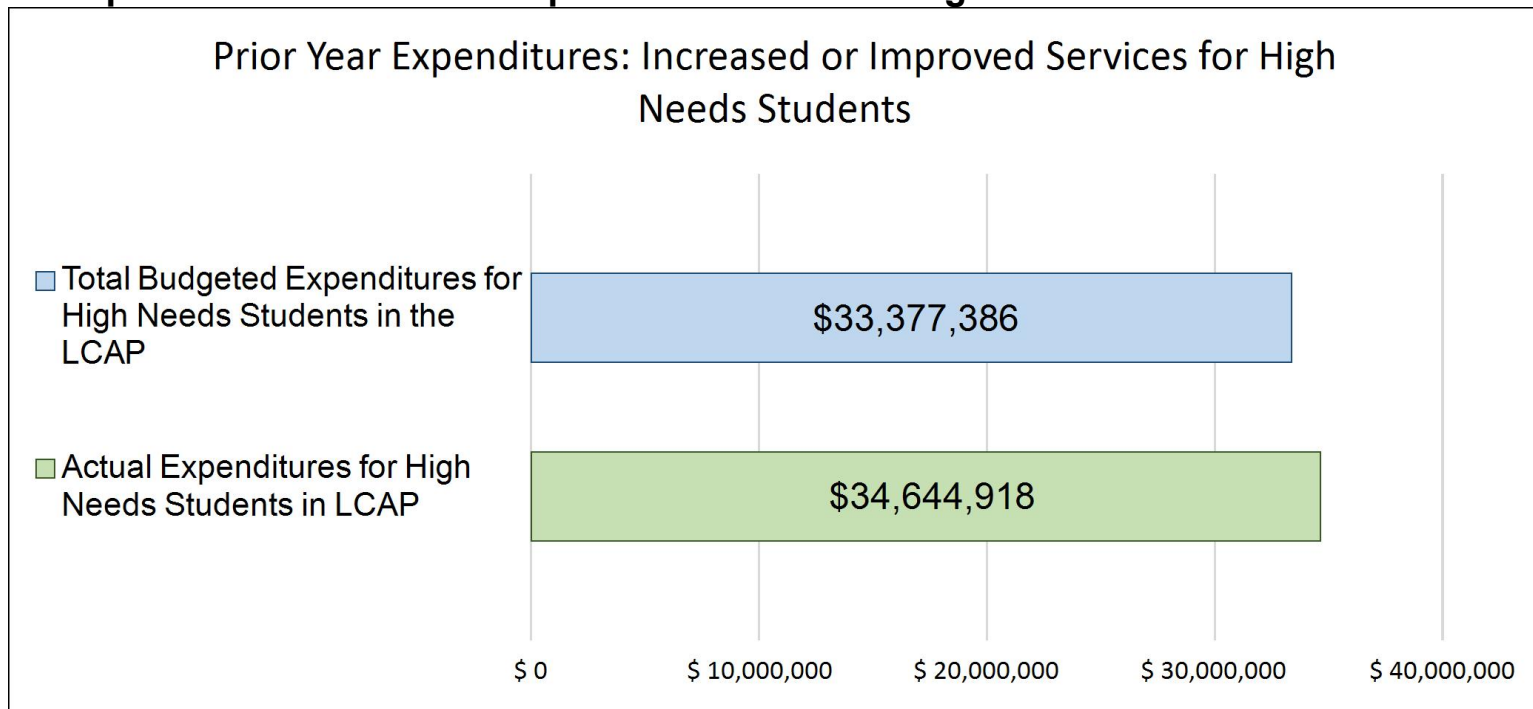
Expenditures not included in the LCAP are non related to the educational program, such as legal, accounting systems, and certain lease expenditures.

Increased or Improved Services for High Needs Students in the LCAP for the 2025-26 School Year

In 2025-26, Sage Oak Charter School is projecting it will receive \$3,453,386 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School plans to spend \$41,983,385 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2024-25



This chart compares what Sage Oak Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2024-25, Sage Oak Charter School's LCAP budgeted \$33,377,386 for planned actions to increase or improve services for high needs students. Sage Oak Charter School actually spent \$34,644,918 for actions to increase or improve services for high needs students in 2024-25.

The difference between the budgeted and actual expenditures of \$1,267,532 had the following impact on Sage Oak Charter School's ability to increase or improve services for high needs students:



Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sage Oak Charter School	Krista Woodgrift Superintendent	kwoodgrift@sageoak.education 888-435-4445

Plan Summary [2025-26]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Sage Oak Charter School educates students through a personalized and collaborative learning approach, offering students from transitional kindergarten through 12th grade an empowering education designed to prepare them for purposeful and productive lives. At Sage Oak, we cherish the individuality of each student, inspiring them to leverage their unique potential and contribute positively to their communities. Our commitment to our students is encapsulated in our core values: Service, Accountability, Growth Mindset, and Excellence, which guide our educational approach and community interactions.

Operating across a diverse geographical region that includes San Bernardino, Inyo, Kern, Los Angeles, Orange, and Riverside counties, Sage Oak offers a unique balance of flexibility, accountability, and academic excellence. Our educational model emphasizes the importance of partnership between educators and families, ensuring that each student's personal academic goals are achieved through a tailored educational experience.

Sage Oak is dedicated to harnessing the power of flexible learning environments and advanced educational technologies to cater to a wide range of learners. Our approach is characterized by personalized learning pathways that accommodate students' diverse backgrounds and aspirations, providing them with a stimulating and supportive alternative to traditional education models. Through the integration of a varied curriculum, individualized support, and high academic standards, Sage Oak fosters an environment where students are encouraged to become self-motivated, competent, lifelong learners poised to make a meaningful impact in their communities.

Our educational philosophy prioritizes the development of open, curious, and alert minds, preparing students to thrive in any learning situation. By offering the flexibility to learn anytime and anywhere, combined with adaptable teaching and curricular models, Sage Oak empowers students to take ownership of their education. This approach equips them with not only the necessary knowledge and skills but also the confidence, creativity, and resourcefulness to navigate the challenges and opportunities of the 21st century.

As of the most recent data reporting period, Sage Oak serves a vibrant and diverse student body, with enrollment reflecting a broad spectrum of cultural and socio-economic backgrounds. Our commitment to inclusivity and excellence is evident in our dedicated staff, innovative programs, and the supportive community that makes Sage Oak a leader in personalized education.

Based on the Fall 1 Census data reporting on October 1, 2025, to be reported on the California Dashboard, there were 3888 students enrolled. Of these enrollments, 719 were identified as Title I students. Other student groups are as follows: 44.41% are classified as Socioeconomically Disadvantaged (SED). Students with Disabilities (SWD) make up 11.98% of the population, and English Learners (EL) make up 2.4%. The ethnic diversity of Sage Oak includes students who are White (32.7%), Hispanic (52.1%), Two or More Races (5.9%), Asian (4.0%), African American (2.4%), Filipino (1.9%), American Indian/Alaskan Native (.2%), and Native Hawaiian/Other Pacific Islander (.3%).

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflecting on Sage Oak's annual performance via the California School Dashboard and local data reveals both triumphs and areas for growth. We perform above the state in all indicators, highlighting our strong academic program. Our achievements are underscored by high graduation rates and college and career readiness, along with very low rates in chronic absenteeism, suspension, and expulsion, indicating a supportive and engaged school environment. However, challenges persist in academic performance, especially for our English Learners (EL), Students with Disabilities (SWD), and Socio-economically Disadvantaged (SED) student groups, with math for SWD highlighted as a critical focus area.

California School Dashboard Analysis

ELA Distance from Standard (DFS):

Overall : -1, (Medium)

EL: -54.8 (Low)

SWD: -63.9 (Low)

SED: -22.8(Low)

Math DFS:

Overall: -31.8 (Low)

EL: -75.6 (Low)

SWD: -100.6 (Very Low) Focus Area
 SED: -55.8 (Low)

Chronic Absenteeism: 1.5% (Very Low)

Graduation Rate: 96.5% (Very High)

Suspension: 0% (Very Low)

Expulsion: 0% (Very Low)

College and Career Readiness: 59.6% (High)

EL Progress (ELPI): 40.7% (Low)

iReady Local Assessment Analysis

ELA (on or above grade level):

Overall : 65%

EL: 25%

SWD:32 %

SED: 58%

Foster (4 students): 50%

Homeless : 69%

Math (on or above grade level):

Overall: 55%

EL: 19%

SWD: 27%

SED: 48%

Foster (4 students): 25%

Homeless : 62%

Our strategic response, aligned with our LCAP goals, not only focuses on targeted interventions, the expansion of professional development opportunities, and the integration of advanced technologies and personalized learning pathways but also emphasizes enhancing college and career readiness pathways. This holistic approach is designed to elevate educational outcomes, ensuring all students, particularly those needing extra support, achieve their fullest potential and are well-prepared for their future careers and academic endeavors.

Learning Recovery and Emergency Block Grant (LREBG)

Sage Oak has unexpended LREBG funds for the 2025-26 school year. LREBG funded actions may be found in Goal 1, Action 2 and Goal 2, Action 4. A review of state and local data, and engagement feedback indicates a need to support our intervention and counseling programs

for qualifying students, ensuring small teacher to student ratios and addressing the needs to engage students of all student groups. Sage Oak has strategically invested in expanding staff supports using the LREBG. This action aligns to allowable uses of funds in the area of staff hiring and development to elevate our intervention programs and resources to all students in both English Language Arts and Mathematics small group instruction. See action descriptions for more.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

n/a

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

n/a

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

n/a

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

n/a

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parent Advisory Committee	The Parent Advisory Committee played a pivotal role in shaping the Local Control and Accountability Plan (LCAP), engaging in key meetings on 9/5/24, 10/3/24, 12/5/24, 1/10/25, 3/6/25, 5/1/25.. Additionally, the Parent Advisory Committee also met with our Board on 3/4/25, sharing their contributions and increasing their valuable influence. They provided valuable insights, focusing on enhancing curriculum options and advocating for educational approaches tailored to diverse student needs. Key areas of emphasis included promoting experiential learning, fostering strong teacher-student relationships, and integrating physical and social activities for comprehensive student development. The committee also highlighted the importance of engaging non-English speaking families and utilizing AI and technology to complement traditional teaching methods. Their contributions were instrumental in formulating strategies that support college and career readiness, reinforce the Multi-Tiered System of Supports (MTSS), and advocate for continuous teacher and staff development.
English Learner Advisory Committee	The English Learner Advisory Committee significantly contributed to the development of the Local Control and Accountability Plan (LCAP) through key meetings on 9/5/24, 12/5/24, 1/10/25, and 5/1/25. Their insights focused on enhancing educational outcomes for English learners, centering on academic achievement, language proficiency, and equitable access to education. They recommended organizing study groups, leveraging online resources, expanding math courses, and promoting the benefits of English Language Development (ELD)

Educational Partner(s)	Process for Engagement
	programs. Additionally, the committee emphasized the importance of parental involvement, training for teachers, and the expanded use of technology. These recommendations are integral to enhancing the LCAP's effectiveness for English learners.
Student Advisory Committee	The Student Advisory Committee was a newly formed committee this year. The student-led committee met four times this school year. They met on 9/6/24, 12/5/24, 1/10/25, and 5/2/25. They played a unique role in contributing to the Local Control and Accountability Plan emphasizing student voice and improving student input on feedback campaigns. They contributed to staff professional learning communities and had a key role in the Spring when connecting with teachers in ways to share input and influence future decisions.
Parents, Students, Teachers, Staff	In the development of the Local Control and Accountability Plan (LCAP), a comprehensive approach was employed to engage parents, staff, and students, ensuring their voices were integral to the plan. This inclusive process utilized various survey platforms, such as Parsec Reals survey platform, to gather in-depth feedback including an AI-led interview regarding parent input. "Question of the Month" surveys were instrumental in capturing ongoing input, while educational partner surveys provided broader insights into the needs and perspectives of the school community. Additionally, climate surveys were conducted to understand the overall environment and satisfaction levels within the educational setting. This multifaceted engagement strategy ensured a diverse range of feedback, which was crucial in shaping a well-rounded and effective LCAP.
Principals, Leadership, Administrators	In shaping the Local Control and Accountability Plan (LCAP), principals, the leadership team, and administrators were essential participants, engaging in strategic initiatives to ensure comprehensive development. Through regular "Question of the Month" surveys, invaluable staff feedback was gathered, providing crucial insights for informed planning. During pivotal meetings on 7/31/24, 8/28/24, 9/18/24, 10/9/24, 1/22/25, 3/5/25, and 4/16/25 the leadership team conducted both half-day and full-day sessions focused on a detailed examination of the school's specific needs, thorough analysis of student achievement data, evaluation of feedback from educational

Educational Partner(s)	Process for Engagement
	<p>partners, developing and analyzing the annual strategic plan as it impacts the LCAP, and an in-depth assessment of LCFF priorities. These sessions were critical in aligning the LCAP with the school's broader objectives, ensuring the plan is both responsive and robust in addressing the diverse needs of the student body. This methodical and collaborative approach guaranteed a well-structured and effective LCAP, poised to enhance every student's educational experience.</p>
Title 1 Parents/Guardians	<p>In the development of the Local Control and Accountability Plan (LCAP), Sage Oak Charter Schools prioritized meaningful engagement with Title I parents and guardians through a multi-faceted approach grounded in its Parent and Family Engagement Policy. One key initiative included the annual Title I Parent/Guardian Information Meetings, held virtually to ensure accessibility. These meetings provided a platform for two-way communication, enabling families to gain important insights into the Title I programs and offer valuable feedback on school strategies and student needs. Sage Oak offers a flexible range of engagement opportunities—including recorded sessions, parent/guardian webinars, and a school-parent compact that seeks feedback from families—which collectively foster an inclusive and supportive school culture. Through consistent communication, such as personalized emails, the weekly Sage News, and outreach to families of Title I students, Sage Oak ensures parents stay informed and empowered to contribute to their child's educational journey. These strategies reflect Sage Oak's commitment to building strong partnerships with families, affirming that their voices are not only heard but are instrumental in shaping educational priorities, enhancing academic outcomes, and fostering student success.</p>
Community Partners	<p>In the development of the Local Control and Accountability Plan (LCAP), the school's partnership with Parsec Education marked a significant enhancement in strategic planning and program evaluation. Parsec Education's expertise was particularly instrumental in developing 'Street Data Metrics,' a set of advanced, nuanced measures designed to provide a deeper understanding of educational impact and student outcomes. This collaboration represents a commitment to incorporating expert external insights and data-driven methodologies into the LCAP. The involvement of Parsec Education</p>

Educational Partner(s)	Process for Engagement
	not only introduced innovative perspectives to the planning process but also ensured that the evaluation of programs was thorough and reflective of real-world educational scenarios. This partnership, especially in the development of these tailored 'Street Data Metrics,' underscores the school's dedication to employing comprehensive, expert-driven strategies to achieve its educational goals and enhance the overall learning experience.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The adopted Local Control and Accountability Plan (LCAP) for Sage Oak Charter School is a direct reflection of the school's robust commitment to inclusive, data-informed decision-making and deep educational partner engagement. Sage Oak's approach is grounded in its Parent and Family Engagement Policy, which outlines a comprehensive framework for involving Title I families and the broader school community in shaping school priorities. Through a blend of community partner surveys, parent/guardian webinars, and advisory councils such as the Parent Advisory Committee (PAC), English Learner Advisory Committee (ELAC), and Student Advisory Committee (STAC), Sage Oak ensures that all voices—especially those of high-needs student groups—inform the development and refinement of school policies and practices.

This year's LCAP development process was notably shaped by consistent input, reflecting the charter network's commitment to equity, even amidst differing student populations and geographic locations. ELAC members praised the school's efforts in supporting multilingual learners but recommended expanding outreach and materials for Spanish-speaking families to further ease transitions and access to services. The PAC and STAC emphasized the importance of improved onboarding for new students, particularly English Language Learners, to help them adapt to the school's independent learning model. They also advocated for enhanced math instruction through engaging formats, increased tutoring options, and more age-appropriate survey tools.

Consistent with Sage Oak's policy, an annual evaluation of parent engagement practices and barriers to participation is conducted, with findings used to update and improve programs. This evidence-based cycle allows for the alignment of initiatives such as college and career readiness, the Multi-Tiered System of Supports (MTSS), and continuous professional development for staff—especially in live, synchronous instruction. Surveys collected through the Parsec Reals platform revealed high satisfaction with Sage Oak's learning environment, safety, and student achievement—often exceeding state benchmarks—while also identifying key areas for growth. Broad staff participation in the LCAP surveys support deep strategic alignment and instructional and leadership development are supported by reflective practices across teams. These Reals assist in building leadership capacity and improving satisfaction. Parent, student, and staff engagement is a clear strength for Sage Oak revealing meaningful engagement across events, academic programs, and formats, including asynchronous and synchronous learning. Student and family voices inform decisions around programming, engagement, and assessment experience. Advisory councils recommended promoting feedback campaigns more proactively and introducing parent chat groups for real-time collaboration. Ultimately, Sage Oak's LCAP reflects a collaborative, transparent, and evolving strategy designed to meet the diverse needs of its learners. Through intentional and recurring engagement with families and staff, Sage Oak continues to position itself as a leader in personalized, inclusive education—preparing all students, especially those with the greatest needs, to thrive academically and personally.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	<p>Student Outcomes: Academic Achievement and College and Career Readiness</p> <p>To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.</p>	Broad Goal

State Priorities addressed by this goal.

<p>Priority 1: Basic (Conditions of Learning)</p> <p>Priority 2: State Standards (Conditions of Learning)</p> <p>Priority 3: Parental Involvement (Engagement)</p> <p>Priority 4: Pupil Achievement (Pupil Outcomes)</p> <p>Priority 5: Pupil Engagement (Engagement)</p> <p>Priority 6: School Climate (Engagement)</p> <p>Priority 7: Course Access (Conditions of Learning)</p> <p>Priority 8: Other Pupil Outcomes (Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

<p>At the heart of this goal lies a commitment to holistic education. Through its standout programs, Sage Oak not only offers an excellent academic foundation but also fosters a love for learning and a commitment to serving the community. These programs are designed to be immersive, innovative, and integrated, ensuring that every student gets a chance to shine and find their passion. Whether it's through advanced academic curricula, extracurricular activities, or real-world application projects, the objective is clear: to produce graduates who are not only academically adept but also critical thinkers, problem solvers, and community leaders.</p> <p>At Sage Oak, our commitment to data-informed practices drives our focus on tangible academic achievements and readiness. Currently, 51% of our high school students have completed A-G requirements. With that and only a small number of students completing CTE pathways, our strategies include enhancing college and career readiness support through high school counselors and the development of additional CTE pathways. Sage Oak also specifically tailors its educational approach to support socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. For our socio-economically disadvantaged students and students with disabilities, CAASPP scores and iReady growth show a need for improvement. In addition, since 50% of students with disabilities are 2 or more grade levels below in iReady Math, and only 40% of English learners progressed in proficiency as measured by ELPAC with a 18%</p>

reclassification rate, dropping from our baseline percentage, our efforts are geared towards ensuring all students reach their fullest potential. With the further development of our AVID program and increasing participation in synchronous instruction, professional development opportunities, and a specific focus on supporting our LTELs and students qualifying for intervention, we aim to lift these scores. By embedding education within immersive, innovative, and integrated programs and utilizing Learning Recovery Emergency Block Grant (LREBG) funds with increased staffing, this goal directly supports all students, enhancing their academic proficiency, critical thinking, college and career readiness, and leadership skills. This inclusive strategy demonstrates Sage Oak's commitment to equitable, high-quality educational opportunities, ensuring all students have the resources and support needed to succeed.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	Completion of A-G Requirements: % of students successfully completing the A-G requirements	39.1% Source: Dataquest 22-23	51.1%		44. %	12%
1.2	Career Technical Education (CTE) Pathway Completion # of students completing CTE pathways	2 students Source: Dataquest 22-23	2 students		30 students	0
1.3	Percentage of Students Achieving a Score of 3 or Higher on AP Exams	72% Source: College Board 22-23	100%		70% or higher	28%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.4	College and Career Indicator (CCI) Performance % of students considered college and career prepared according to the CA Dashboard	56.9% Source: CA Dashboard 22-23	59.6%		62%	2.7%
1.5	Graduation Rate Maintenance % of graduated students on the CA Dashboard	92% Source: CA Dashboard 22-23	96.5%		90%	4.5%
1.6	Maintenance of Low Middle School Dropout Rates # of middle school dropouts	0.39% Source: Internal 22-23	.52%		0	.13%
1.7	Maintenance of Low High School Dropout Rates % of high school dropouts according to DataQuest cohorts	2% Source: Dataquest 22-23	1.42%		2% or less	-.58%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.8	Expansion of K-8 Live Synchronous Instruction Courses Aligned with CTE Pathways # of K-8 synchronous course offerings that align with the CTE pathways	79 course offerings Source: Internal 22-23	198 course offerings		200 course offerings	119
1.9	Performance in iReady Assessments for ELA and Math % of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics	Math- 55% ELA -65% Source: i-Ready 23-24 Spring	Math- 56% ELA -66%		Math- 58% ELA -68%	Math - 1% ELA - 1%
1.10	California Assessment of Student Performance and Progress (CAASPP) Achievement % of students who have met or exceeded standards in CAASPP assessments for English Language Arts (ELA) and Mathematics	Math- 37.95% ELA -54.32% Source: Dataquest 22-23	Math - 37.65% ELA - 49.53%		Math- 41% ELA -57%	Math -.3% ELA -4.79%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.11	CAASPP Performance for Socio-Economically Disadvantaged (SED) Students % of socio-economically disadvantaged students meeting or exceeding CAASPP standards in English Language Arts (ELA) and Mathematics	Math- 28.99% ELA- 43% Source: Dataquest 22-23	Math - 28.55% ELA-41.31%		Math- 31% ELA- 46%	Math -.44% ELA -1.69%
1.12	Accessibility to Instructional Materials % of students with full access to necessary instructional materials	100% Source: SARC 23-24	100%		100%	0%
1.13	Alignment with State Standards % of students whose education is fully aligned with state standards	100% Source: SARC 23-24	100%		100%	0%
1.14	Community Belief in Robust Curriculum % of parents, students, and staff who believe that students have access to a challenging and comprehensive	Parents- 98% Students- 98% Staff- 99% Source: Internal 23-24	Parents - 98% Students - 97% Staff - 94%		Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 0 Students -1% Staff -5%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.					
1.15	<p>Growth in ELA and Math Among Intervention Students</p> <p>% of students receiving interventions who demonstrate growth equivalent to one year or more in English Language Arts (ELA) and Mathematics</p>	<p>Math- 56%</p> <p>ELA- 40%</p> <p>Source: Internal 22-23</p>	<p>Math - 56%</p> <p>ELA - 53%</p>		<p>Math- 61%</p> <p>ELA- 45%</p>	<p>Math 0%</p> <p>ELA 13%</p>
1.16	<p>Increased Participation Rate in Math Interventions for Students with Disabilities (SWD)</p> <p># of SWD participating in math intervention programs</p>	<p>54%</p> <p>Source: Internal 23-24</p>	64%		60%	10%
1.17	Increased iReady Math Achievement for Students with Disabilities (SWD)	<p>49%</p> <p>Source: i-Ready 22-23</p>	50%		46%	1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	Decrease % of SWD in Tier 3 in iReady math assessments					
1.18	Improved CAASPP Performance for SWD in Math Achievement Increase in DFS in Math for SWD 3 points annually	-102.7 DFS Source: CA Dashboard 22-23	-100.6 DFS		-93 DFS	2.1
1.19	Increased Teacher Preparedness for Student Articulation % of teachers who feel equipped to effectively prepare and transition their students to the next grade level band	78% Source: Internal 23-24	98%		90% or higher	20%
1.20	Increased Progress Toward English Proficiency % of English learners making progress toward English proficiency, as measured by the English Language Proficiency Assessments for California (ELPAC).	60% Source: CA Dashboard 22-23	40.7%		65%	-19.3%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.21	Increased English Learner Reclassification Rate % reclassification rate of English learners	38% Source: Internal 22-23	18%		41%	-20%
1.22	Maintain Participation in ELD Synchronous Instruction	67% Source: Internal 23-24	93%		75%	26%
1.23	Maintain Belief That EL Students Have Access to Resources % of parents, students, and staff affirming access to a variety of resources effectively supporting English Learner students' achievement	Parents- 100% Students- 87% Staff- 78% Source: Internal 23-24	Parents - 100% Students - 95% Staff - 93%		Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 0 Students 8% Staff 15%
1.24	% of LTEL students making progress toward English proficiency as measured by ELPAC ELPI levels	40% Source: CA Dashboard 23-24	N/A (metric added year one)		45%	N/A
1.25	Increased number of professional development	1 Source: Internal 24-25	N/A (metric added year one)		6	N/A

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	opportunities supporting ELD and LTEL instruction					

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Academic Achievement and College & Career Readiness

Sage Oak Charter School made meaningful progress in the implementation of Goal 1 initiatives, aimed at improving academic performance and expanding access to college and career readiness (CCR) pathways. Grounded in the strategic plan, the year's implementation focused on personalized instruction, increased course access, and targeted support for high-need student groups including English Learners (ELs), Long-Term English Learners (LTELs), Students with Disabilities (SWD), and Socioeconomically Disadvantaged (SED) students.

Planned vs. Actual Implementation:

Planned actions included the expansion of Career and Technical Education (CTE) pathways, AVID 9/10 integration, A-G counseling supports, increased synchronous instruction, and improved tiered interventions. While many of these initiatives were implemented as intended, a few require strategic adjustments or are still in development.

For example, the AVID 9/10 elective was successfully piloted and fully implemented this year. Additionally, Sage Oak's Oakschool program—a name used for its live, synchronous course offerings—received positive feedback from students. Oakschool provides a wide range of real-time, teacher-led classes in both core subjects and enrichment areas for students in grades TK–12. Notably, the number of CTE-aligned Oakschool offerings grew significantly, increasing from 79 to 198 courses by the end of the year. This expansion places the school on track to meet its goal of 200 synchronous courses by 2026.

In terms of A-G completion, Sage Oak saw notable growth, with SOCS rising from 39.1% to 51.1%. These improvements reflect strengthened academic counseling and intentional alignment of coursework with university entrance requirements.

AP exam participation and performance at Sage Oak showed a marked improvement in 2023–24. Six students attempted a total of 10 AP exams, and all 10 exams were passed, resulting in a 100% pass rate. This is a notable gain from the prior year, when only 7 students attempted AP exams with a 71% success rate. The improved outcomes reflect stronger instructional alignment, student preparation, and support. However, participation still remains below the state average. To further increase access, Sage Oak continues to pursue official AP testing site status, which would enable in-house virtual testing options for high-demand courses like AP Computer Science and AP Studio Art—making exams more accessible and reducing logistical barriers for students.

In the area of CTE pathway completion, data showed low overall completion numbers. However, this metric does not fully capture the school's CTE engagement and progress and enrollments continue to increase in our current five pathways. Each new pathway (e.g., Entrepreneurship, Computer Science, Sports Medicine) is piloted for one year to assess student interest before full implementation. Because these are multi-year programs, students who transfer or graduate early are recorded as non-completers—even when they pursue the same career field elsewhere.

To address this, Sage Oak has begun developing fully built-out internal CTE pathways, including in-house capstone projects that enable students to complete the entire sequence without relying on external options. In 2024–25, Sage Oak also piloted a Computer Science internship, and plans to expand next year with the addition of a Child Development internship in the VLA TK class. These steps reflect a deepening commitment to hands-on, career-connected learning that is accessible and sustainable within Sage Oak's instructional model. On the academic achievement side, iReady diagnostic data showed modest but meaningful growth. In Spring 2024, iReady Math scores rose slightly from 55% to 56%, and ELA scores increased from 65% to 66% of students performing at or above grade level compared to our baseline year. The school expanded its intervention capacity by hiring additional Tier 2 and Tier 3 support staff using Learning Recovery Emergency Block Grant (LREBG) funds. These intervention teachers provided targeted small group instruction aligned to iReady diagnostics, collaborated with general education staff to adjust instruction, and supported progress monitoring. As a result, 53% of intervention students demonstrated at least one year of growth in ELA, and 56% in math, contributing to a narrowing of achievement gaps—particularly for SWD and SED students. This data indicates that while continued refinement is needed, intervention strategies at SOCS are making a measurable impact on academic outcomes.

Successes:

Personalized and Synchronous Instruction Expansion:

Sage Oak grew from 79 to 198 synchronous CTE-aligned offerings, diversifying learning pathways and increasing access to high-interest content across K–8.

College & Career Indicator (CCI) Gains:

CCI rates improved from 56.9% to 59.6%, supported by expanded course access, academic counseling, and pathway clarity.

A-G Completion Growth:

Significant gains in A-G completion demonstrate success in improving academic planning and access to college-prep coursework.

Math Intervention Expansion (iReady):

Intervention staffing funded through LREBG grants supported stronger performance among students receiving targeted math and ELA interventions. Growth was particularly seen among students moving out of Tier 3.

Educational Partner Engagement:

Stakeholder feedback from surveys and advisory groups reflected high levels of satisfaction with access to challenging curriculum, college and career readiness, diverse course offerings, and personalized academic support. Parents, students, and staff also expressed confidence in the support provided for English learners, noting that a range of targeted resources has positively influenced their academic achievement. In addition, Sage Oak teachers reported high satisfaction with professional development specifically designed to help them prepare students

for the expectations and standards of the next grade level, reinforcing the school's commitment to instructional alignment and continuous improvement.

Challenges:

Persistent Achievement Gaps:

SWD, ELs, and SED students continue to underperform in CAASPP and iReady assessments—especially in math. SWD at SOCS had a CAASPP Math DFS of -100.6, and only 19% of ELs were on grade level in iReady Math, reflecting a continued need for targeted intervention. These results suggest that while intervention structures are in place, instructional approaches must be further differentiated, and supports must be enhanced to effectively close achievement gaps for these high-need populations.

CTE Pathway Completion Tracking:

While participation is growing, multi-year structure, student transfers, and absence of internal capstones contributed to low recorded completion rates. Continued investment in internal pathway design and internship partnerships is a priority.

AP Participation Barriers:

The absence of a centralized testing site has created access challenges, impacting both participation and performance. This improvement for year 2 is expected to provide a more supportive testing environment and boost future participation and performance.

Conclusion and Next Steps:

Sage Oak demonstrated strong intent and partial success in implementing Goal 1. Gains in CCI, A-G completion, synchronous learning, and intervention support were offset by slower growth in CTE completions, achievement gaps, and AP outcomes. As the school enters Year 2 of the LCAP cycle, action plans are being refined to:

- Expand internal CTE capstone options and internships;
- Become an official AP testing site;
- Increase professional development for EL and math instruction;
- Intensify Tiered supports for students.

Ongoing community input, use of real-time data, and strategic design will ensure implementation evolves to meet the needs of all learners—preparing every student for college, career, and life success.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 1.3 related to increased expenditures for math materials. The school also spent less for action 1.2 related to budgeted but unfilled positions.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The actions undertaken to support Goal 1 have yielded a range of outcomes, with areas of clear growth alongside others requiring further strategic attention. The overall focus on enhancing personalized learning, college and career readiness (CCR), and equitable academic support, especially for historically underserved student groups, has set a strong foundation. However, key metrics indicate the need to adjust and intensify implementation in certain areas, including for English Learners (ELs), Students with Disabilities (SWD), and students pursuing AP exams and CTE pathways.

College and Career Readiness – Moderately Effective

The school made measurable progress in increasing College and Career Indicator (CCI) performance. Rates rose from 56.9% to 59.6% as a result of expanded course offerings, synchronous instruction, and improved counseling supports. Yet, despite these gains, CTE pathway completion remains low, and A-G completion growth has been incremental. The slower pace of growth is largely attributed to student preference for non-A-G options and delayed implementation of internal capstone courses in CTE programs.

Career Technical Education (CTE) Pathway Completion – Emerging Effectiveness with Accessibility Gains

The CTE pathway completion metric is designed to reflect not only student vocational success but also engagement with career-readiness programming. Historically, Sage Oak's CTE pathway completion numbers have appeared low (e.g., SOCS: 2 completers in 2023–24). However, this does not fully represent the program's progress or student participation. While traditional completion rates remain modest due to technical and structural factors, student engagement is growing, and expanded access strategies—like internal capstones and internships—are expected to significantly increase future completions and readiness.

AVID and Synchronous Instruction Expansion – Highly Effective

The rollout of the AVID 9/10 elective and a significant increase in synchronous courses (from 79 to 198 offerings) have greatly expanded access to rigorous and career-connected instruction. These initiatives have been well-received by students and families and directly support both academic achievement and career readiness. The school is on track to meet its three-year goal of 200 synchronous offerings aligned to CTE pathways.

AP Exam Participation and Performance – Emerging Effectiveness with Accessibility Gains

The AP metric measures both academic proficiency at the college level and the extent to which students are supported in accessing and succeeding in rigorous coursework. Sage Oak has a consistent history of AP exam participation, and 2023–24 marked a strong rebound in both performance and access. Ten exams were attempted by six students—all of which were passed—resulting in a 100% pass rate. This represents a return to strong performance following a dip in 2022–23, when seven exams were attempted and five passed (71%). The site's historical data shows generally high achievement, with perfect pass rates in 2019–20, 2020–21, and 2021–22. The recent increase in both volume and success suggests that previous access barriers are being addressed. Sage Oak continues its efforts to become an official AP testing site, which would reduce logistical challenges and enable more students to participate, especially in subjects like AP Computer Science and AP Studio Art. Moving forward, the focus will be on maintaining high performance while continuing to expand participation.

Math and ELA Achievement – Varied Effectiveness by Subgroup

At Sage Oak Charter School, data from CAASPP and iReady reflect modest gains in overall academic achievement, but persistent disparities for SWD, ELs, and SED students. The SWD Math DFS remains critically low at -100.6.. For SED students, only 28.55% met or exceeded standards in CAASPP Math. While ELA data shows stronger performance—66% on or above grade level overall in iReady ELA, and 53% growth among intervention students—gaps persist for SWD and ELs. iReady results showed continued improvement, with math performance rising from 55% to 56% of students achieving at or above grade level from spring 2023 to spring 2024, signaling steady progress in core academic areas. Sage Oak has responded with increased MTSS staffing, expanded intervention delivery, and a focus on tiered math instruction and professional development, particularly around EL and SWD instructional strategies. The hiring of additional MTSS intervention teachers funded by LREBG is embedded within this goal and supports intervention delivery measured by Metric 1.15 where Sage Oak saw students grow one year or more from implemented interventions and small group instruction.

English Learner Outcomes – Emerging, With Targeted Enhancements

Recent updates to EL metrics and actions reflect a stronger, more strategic focus on this group. In 2024–25, EL proficiency as measured by ELPAC was 40% at SOCS—categorized as Low on the Dashboard. Additionally, only 19% of ELs scored at or above grade level in iReady Math, and 25% in iReady ELA, underscoring the continued need for targeted language development and academic support.

To address this, Sage Oak has:

- Revised Goal 1 actions to explicitly include Long-Term English Learners (LTELs),

- Increased professional development on integrated ELD strategies,

- Enhanced tracking using a new platform called ELlevation, and

- Committed to increasing EL participation in synchronous instruction through more inclusive scheduling and multilingual family outreach.

Feedback from the ELAC Reflection Survey 2024/25 further emphasized the value of these efforts. Families shared that they feel increasingly aware of the resources and support opportunities available to their English Learners, including access to online academic tools, live instructional sessions, and translated materials. Several respondents specifically noted the importance of continuing to grow academic intervention opportunities tailored to ELs and ensuring regular communication from teachers about their child's language progress. These insights affirm the direction of Sage Oak's work and highlight the importance of building on these foundational improvements. While the full impact will be assessed in the coming LCAP cycle, early implementation and family feedback point toward a stronger, more accessible EL support system.

Articulation and Data Use – Strengthening with Significant Progress

Sage Oak has made notable progress in implementing a unified, data-informed articulation process between grade spans, aimed at improving instructional continuity and supporting student transitions. A key indicator of this growth is the increase in teacher-reported confidence—rising from 78% to 98%—in their ability to articulate learning expectations and support students across grade levels. This shift reflects the successful rollout of professional development around MasteryConnect and Power Standards, as well as a growing culture of data-driven collaboration. While continued refinement and system-wide consistency are still in progress, this marked improvement in teacher readiness signals that Sage Oak is moving from foundational development to sustained implementation.

Summary of Effectiveness:

Effective Actions: Synchronous CTE course expansion, AVID implementation, improvements in overall CCI performance, professional development, and student access to resources

Partially Effective Actions: A-G pathway counseling, math interventions.

Currently Ineffective Actions: AP exam preparation at SOCS, CTE pathway completions, academic outcomes for SWD and EL students.

Continued use of formative data, targeted professional development, and engagement with educational partners are essential to improving outcomes across all student groups in the remaining years of this LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

As a result of the comprehensive analysis of data, stakeholder feedback, and implementation progress during the 2024–2025 LCAP year, specific targeted adjustments have been made to Goal 1—focused on Academic Achievement and College & Career Readiness—to more effectively meet the needs of all students, especially those in historically underserved groups.

Strengthening Support for English Learners (ELs) and LTELs:

Based on ongoing low performance in iReady (ELA: 25%, Math: 19%) and ELPI proficiency (40%), the following revisions were made:

Expanded focus to include Long-Term English Learners (LTELs) explicitly in the action language.

Increased professional development for teachers on integrated and designated ELD instructional strategies.

Added monitoring systems using the Equity Tracker to ensure ELs are equitably represented in synchronous learning and core instruction.

Planned parent outreach enhancements, including multilingual resources and better onboarding support for EL families.

LREBG update

Additionally, Action 2 has been refocused to reflect the inclusion of Learning Recovery Emergency Block Grant (LREBG) funding. Metric 1.15 now incorporates the strategic use of these funds to expand staffing and strengthen academic interventions for students requiring additional support. This enhancement allows Sage Oak to respond to the increasing number of students in need of targeted instruction. The goal is to help students access and master grade-level standards, leading to improved performance on both local assessments (such as i-Ready) and statewide assessments (such as CAASPP). Emphasis remains on fostering measurable academic growth year over year, with a particular focus on our intervention population.

These changes aim to close performance gaps and reflect Sage Oak's commitment to continuous improvement and responsive planning based on data, educational partner input, and the principles of equity and personalized learning. They aim to ensure every student is fully supported in reaching their academic potential and future career goals.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Integration of Career, Community, and Life Skills	<p>Integrate career, community, and life skills into comprehensive K-12 pathways.</p> <p>This action is dedicated to integrating career, community, and life skills within comprehensive K-12 pathways. It focuses on equipping students with the essential capabilities needed to navigate their future careers and community life successfully. By weaving these skills into the curriculum, we aim to ensure students are academically prepared and possess the practical skills required for the modern workforce and societal participation. This initiative prioritizes equitable opportunities for all students, emphasizing support for unduplicated students, to lay the groundwork for successful transitions to higher education and careers.</p> <p>Metrics for Effectiveness:</p> <p>1.1 Completion of A-G Requirements: The total number of students successfully completing the A-G requirements, indicating readiness for university admission.</p> <p>1.2 Career Technical Education (CTE) Pathway Completion: The quantity of students completing CTE pathways, reflecting vocational engagement and preparedness.</p> <p>1.3 Percentage of Students Achieving a Score of 3 or Higher on AP Exams: The proportion of students who attempt and succeed in Advanced Placement exams, demonstrating college-level academic proficiency. Percentage is reflective of participation as well as passing.</p> <p>1.4 College and Career Indicator (CCI) Performance: Evaluation of students' readiness for post-secondary opportunities through the College and Career Indicator, assessing comprehensive preparedness for college and careers.</p> <p>1.5 Graduation Rate Improvement: An increase in graduation rates, signifying the effectiveness of educational pathways in guiding students to complete their education.</p> <p>1.6 Maintain Low Middle School Dropout Rates: A maintenance of low dropout rates at the middle school level, identifying early intervention points to maintain student engagement.</p> <p>1.7 Maintain Low High School Dropout Rates: A maintenance of low dropout rates at the high school level, crucial for assessing the pathways' role in sustaining student engagement through graduation.</p>	\$45,059,783.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>1.8 Expansion of Live Synchronous Instruction Courses Aligned with CTE Pathways: The expansion of live synchronous instruction courses that directly support CTE pathways, measuring the integration of career-oriented education within the academic curriculum.</p> <p>This action is crafted to not only achieve academic benchmarks but also to cultivate a comprehensive educational experience that thoroughly prepares students for both college and career trajectories.</p>		
1.2	Refinement of Multi-Tiered System of Support	<p>Refine a personalized, data-informed multi-tiered system of support. The focus of the services is on students from unduplicated and identified populations.</p> <p>This action aims to refine a personalized, data-informed multi-tiered system of support (MTSS) that caters to the unique needs of each student. By leveraging comprehensive data analysis and targeted interventions, we will enhance academic achievement and support emotional and social development. This approach is designed to ensure all students, especially those facing socio-economic challenges, receive the necessary support to excel academically.</p> <p>Metrics for Effectiveness:</p> <p>1.9 Performance in iReady Assessments for ELA and Math: Proportion of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics, indicating proficiency and readiness.</p> <p>1.10 California Assessment of Student Performance and Progress (CAASPP) Achievement: Percentage of students who have met or exceeded standards in CAASPP assessments for Math and ELA, reflecting comprehensive academic achievement.</p> <p>1.11 CAASPP Performance for Socio-Economically Disadvantaged (SED) Students: Percentage of socio-economically disadvantaged students meeting or exceeding CAASPP standards in Math and ELA, highlighting the effectiveness of targeted support.</p>	\$4,050,855.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>1.12 Accessibility to Instructional Materials: Percentage of students with full access to necessary instructional materials, ensuring equity in learning resources.</p> <p>1.13 Alignment with State Standards: Percentage of students whose education is fully aligned with state standards, promoting consistent educational quality.</p> <p>1.14 Community Belief in Robust Curriculum: Proportion of parents, students, and teachers who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.</p> <p>1.15 LREBG Action Growth in ELA and Math Among Intervention This action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our intervention programs. By increasing instructional personnel, Sage Oak is able to provide more consistent, small-group, and individualized support for students receiving Tier 2 and Tier 3 interventions. This enhancement directly supports the academic progress of students performing below grade level, particularly those from unduplicated groups and students with disabilities.</p> <p>The goal of this action is to equip students with the skills and confidence needed to meet or exceed grade-level standards. By embedding additional instructional capacity through LREBG-funded staff, we aim to accelerate learning and ensure that a greater percentage of intervention students experience at least one year of academic growth annually. This action reinforces our commitment to equitable access to a robust, rigorous curriculum, supported by the necessary resources and targeted instruction to help all students thrive.</p>		
1.3	Enhancement of Math Proficiency for Students with Disabilities	Improve math proficiency for students with disabilities by increasing the percentage of students with disabilities participating in math interventions. This action is dedicated to improving mathematics proficiency among students with disabilities by expanding their participation in specialized math intervention programs. Recognizing the unique challenges faced by	\$655,400.00	No

Action #	Title	Description	Total Funds	Contributing
		<p>these students, our targeted approach aims to elevate their math skills through personalized and adaptive learning strategies. By doing so, we endeavor to facilitate meaningful academic progress and reduce disparities in math achievement.</p> <p>Metrics for Effectiveness:</p> <p>1.16 Participation Rate in Math Interventions: Increase in the percentage of students with disabilities participating in math intervention programs, aiming to ensure comprehensive access to support services tailored to their needs.</p> <p>1.17 Increased iReady Math Achievement for Students with Disabilities (SWD): Measurement of the number of students with disabilities moving out of Tier 3 in iReady math assessments. Tier 3 represents students performing two or more years below grade level. While measuring achievement at or above grade level for this group may not be appropriate, monitoring their progress out of Tier 3 provides a meaningful indicator of improvement in math proficiency.</p> <p>1.18 California Assessment of Student Performance and Progress (CAASPP) for SWD Math Achievement: Analysis of CAASPP math scores for students with disabilities to track advancements in state-standardized math achievement, with a focus on increasing the percentage of students meeting or exceeding math standards.</p> <p>This action underscores our commitment to inclusivity and equity in education by specifically addressing the needs of students with disabilities. Through targeted math interventions, we aim not only to improve math proficiency but also to foster a supportive learning environment that acknowledges and addresses the diverse needs of our student population.</p>		
1.4	Unified Articulation Process Development	<p>Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.</p> <p>This action focuses on developing a unified, data-informed articulation process to ensure smooth transitions for students as they move through each grade band (e.g., from elementary to middle school, and middle</p>	\$0.00	No

Action #	Title	Description	Total Funds	Contributing
		<p>school to high school). By integrating feedback from graduates and utilizing comprehensive data analysis, we aim to refine our educational pathways to better prepare students for the expectations and standards of their next academic phase. This process is designed to enhance communication between teachers across grade bands, ensure curriculum continuity, and address any potential gaps in student preparedness.</p> <p>Metrics for Effectiveness:</p> <p>1.19 Teacher Preparedness for Student Articulation: The percentage of teachers who feel equipped to effectively prepare and transition their students to the next grade level band. This metric will be measured through targeted surveys asking teachers if they feel confident in their ability to communicate the expectations and standards of the next grade level, ensuring they have the resources and knowledge necessary to support their students' progression.</p> <p>By establishing a comprehensive articulation process that leverages both quantitative data and qualitative feedback from our educational community, this action aims to foster a more cohesive and supportive learning environment. It ensures that students are not only academically prepared for each transition but also that educators feel supported and equipped to guide them effectively through their educational journey</p>		
1.5	Enhancing English Learner Proficiency and Reclassification	<p>Increase the percentage of both EL and LTEL students making progress toward proficiency as measured by the state language proficiency assessment and increase English learner reclassification rate by increasing participation with ELD synchronous instruction.</p> <p>This action concentrates on elevating the proficiency levels of English learners and increasing their reclassification rates by providing greater access to synchronous instruction. Recognizing the critical role of language proficiency in academic success and integration, we aim to expand and enrich our English Language Development (ELD) and core subject synchronous instruction. This strategic enhancement is designed to offer English learners more opportunities for real-time interaction,</p>	\$0.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>feedback, and engagement, thereby accelerating their progress toward English proficiency and readiness for reclassification.</p> <p>Metrics for Effectiveness:</p> <p>1.20 Progress Toward English Proficiency: Increase in the percentage of English learners making progress toward English proficiency, as measured by the English Language Proficiency Assessments for California (ELPAC).</p> <p>1.21 English Learner Reclassification Rate: Improvement in the reclassification rate of English learners, indicating successful attainment of proficiency and readiness to transition out of ELD support programs.</p> <p>1.22 Participation in ELD Synchronous Instruction: Maintenance or increase in participation rates in ELD synchronous instruction, ensuring English learners have access to the dedicated support necessary for language acquisition.</p> <p>1.23 Access to Supportive Resources for English Learners: Proportion of parents, students, and teachers affirming access to a variety of resources effectively supporting English Learner students' achievement, as revealed through targeted surveys. This metric gauges the adequacy and effectiveness of resources provided to support the language acquisition and academic success of English learners.</p> <p>1.24 Progress Toward English Proficiency: Increase in the percentage of LTELs making progress toward English proficiency, as measured by the English Language Proficiency Assessments for California (ELPAC) ELPI levels.</p> <p>1.25 Increased number of professional development opportunities supporting ELD and LTEL instruction.</p> <p>Through targeted actions to enhance synchronous instruction and resource availability, this initiative aims to significantly improve the language proficiency and academic outcomes for English learners, including LTELs, ensuring they are well-equipped to achieve reclassification and succeed in their broader educational journey.</p>		

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	Engagement: Fostering a Supportive and Engaging Learning Environment In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Building on Sage Oak's strategic commitment, Goal 2 aims to cultivate a supportive and engaging learning environment by emphasizing the well-being and professional growth of our staff, alongside fostering stronger connections within our school community. This goal is rooted in the belief that the success of our educational mission is intertwined with the development and satisfaction of our educators and staff. By investing in comprehensive professional development, mentorship programs, and creating a nurturing work environment, we aspire to empower our educators. This empowerment is expected to cascade, enhancing the educational experience for students and fostering a sense of belonging and community alignment with Sage Oak's mission and vision.

Sage Oak's efforts are influenced by feedback from the WASC visiting committee and include specific action steps aimed at increasing opportunities for parent and student engagement, developing purposeful professional growth pathways for staff, enhancing live instruction through targeted professional development, and establishing a robust system for social and emotional support. These targeted actions demonstrate Sage Oak's balanced approach to educational excellence, ensuring every member of our community is supported to thrive.

Furthermore, these initiatives directly contribute to increased or improved services for our unduplicated student populations, including socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. By creating a more engaging, supportive, and well-resourced learning environment, we aim to elevate the educational outcomes and well-being of these students, ensuring that our programs and resources are tailored to meet their specific needs and challenges. This aligns with our objectives to deliver equitable, high-quality educational opportunities, making significant strides in supporting all students, particularly those who require additional assistance, to achieve success and reach their full potential.

Through increased staffing funded by the Learning Recovery Emergency Block Grant (LREBG), Sage Oak is expanding access to social-emotional supports as outlined in Goal 2, Action 4. This targeted investment strengthens our ability to meet the diverse needs of all students, supporting their academic growth, social-emotional well-being, and readiness for future college and career pathways. This approach reflects Sage Oak's continued commitment to equitable, high-quality educational opportunities for every learner.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintenance of Positive Community Engagement Perception % of parents, students, and staff that believe Sage Oak makes a significant effort to foster community engagement	Parents 99% Students 97% Staff 100% Source: Internal 23-24	Parents 85% Students 86% Staff 97%		Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents -14% Students -11% Staff -3%
2.2	Maintain 100% Credentialed Teachers % of credentialed teachers	100% Source: Internal 23-24	100%		100%	0
2.3	Maintenance of High Attendance Rate % of school attendance rates (ADA)	99.2% Source: Internal 23-24	99.3%		98% or higher	.1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.4	Maintenance of Low Chronic Absenteeism % of chronic absenteeism	2.4% Source: CA Dashboard 23-24	1.5%		Below 3%	-.9%
2.5	Maintenance of Low Suspension and Expulsion Rates % suspension and expulsion rates	Suspension- 0% Expulsion- 0% Source: CA Dashboard and Dataquest 22-23	Suspension - 0% Expulsion - 0%		Suspension- 0% Expulsion- 0%	Suspension 0% Expulsion 0%
2.6	Maintain Positive Connection to School's Mission % of the parents, students and staff that feel connected to the school's mission	Parents 90% Students 83% Staff 96% Source: Internal 23-24	Parents 90% Students 89% Staff 95%		Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents 0% Students 7% Staff -1%
2.7	Increased Student Retention Rate student retention rate	65% Source: Internal 22-23	71%		75%	6%
2.8	Maintain Positive School Climate % of the parents, students, and staff that	Parents 98% Students 96% Staff 97%	Parents 90% Students 95% Staff 99%		Parents 90% or higher Students 90% or higher	Parents -8% Students -1% Staff 2%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	feel the school prioritizes safety, value, and respect	Source: Internal 23-24			Staff 90% or higher	
2.9	Confidence and Integration of New Strategies % of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles	100% Source: Internal 23-24	100%		100%	0
2.10	Increased Retention Rates of Participating Staff retention rates of staff members who have participated in the professional development pathways	72% Source: Internal 23-24	83%		80%	11%
2.11	Expansion of Professional Development Opportunities # of professional development opportunities offered to	4 Source: Internal 23-24	6		10	2

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	staff, focusing on live instruction					
2.12	Improved Staff Confidence in Job Performance % of staff who believe they are well-equipped by Sage Oak to perform their roles effectively	97% Source: Internal 23-24	97%		90% or higher	0
2.13	Increased Awareness of Socio-Emotional Resources % of parents, students, and staff that report feeling informed about the social and emotional resources provided by Sage Oak	Parents- 89% Students- 89% Staff- 93% Source: Internal 23-24	Parents - 93% Students - 90% Staff - 94%		Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 4% Students 1% Staff 1%
2.14	Expansion of Synchronous Support Opportunities # of synchronous support groups or classes with counselors	23 Source: Internal 23-24	66		29	43

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

For the 2024–2025 academic year, Goal 2 focused on increasing student engagement and improving attendance by cultivating a positive instructional culture, enhancing live synchronous learning, expanding professional development aligned to instructional quality, and maintaining a strong school climate. A particular emphasis was placed on improving instructional strategies used during live synchronous sessions to ensure increased student engagement and academic support for all student groups.

The core areas of implementation included:

Providing multiple rounds of professional development with a key focus on live instruction;

Strengthening staff confidence, leadership qualities, and instructional consistency;

Maintaining low rates of suspension, expulsion, and chronic absenteeism;

Increasing student access to social-emotional learning (SEL) resources and real-time supports by also utilizing LREBG funds to increase staffing.

These actions were fully launched and sustained throughout the year, demonstrating strong alignment with the original LCAP action plan.

While all key actions were implemented, a few notable differences emerged:

Professional Development Expansion Beyond Baseline: Sage Oak implemented six professional development sessions, increasing from four in 23-24. These sessions provided teachers with hands-on learning in research-based strategies, including cognitive task analysis (CTA), visible learning goals (VLG), and classroom discussion techniques. Sessions were grounded in John Hattie's visible learning research and equipped teachers with high-impact strategies that were both practical and classroom-ready. This marked a clear step forward in building a more robust instructional culture.

Expansion of Synchronous Instruction Professional Development: To support implementation of high-leverage instructional strategies, Sage Oak also provided targeted training on technology platforms such as Nearpod, Classkick, Canva, and MagicSchool AI. This shift allowed instructors to directly apply tools that enhance student engagement and formative assessment during live classes as well as to explore and apply evidence-based strategies, such as cognitive task analysis, classroom discussion techniques, and the use of visible learning goals, well beyond the original plan.

SEL System Growth: Access to real-time SEL support expanded from 23 to 66 counselor-led sessions, directly contributing to improved awareness and use of resources across campuses.

Sage Oak improved retention from 65% to 71%, indicating stronger alignment between instructional practice, advisory support, and student/family expectations.

Minor Challenge Encountered:

Professional Development Pacing and Depth: Reflecting on teacher feedback showed some professional development sessions covered dense content in short timeframes. Future iterations may benefit from spreading content over time to allow deeper skill-building.

Successes in Implementation:

School Climate and Connection Metrics Improved

School Climate:

Students: 95%+ reported feeling safe, valued, and respected.

Parents: 90–99% reported strong satisfaction with the school environment.

Staff: Reported 99% alignment with a positive, respectful climate.

Parent Advisory Council Insight: Parents highlighted the personalized learning model and strong advisor relationships as standout strengths that contributed to their child's academic success and emotional well-being.

Student retention rate grew from 65% to 71%.

Connection to Mission:

Student connections to Sage Oak's mission rose to 89%.

Awareness of SEL Supports:

90%+ of students and staff, and over 91% of parents, reported feeling informed about the availability of SEL services and resources.

Parent Advisory Council feedback also emphasized increased visibility of mental health resources and proactive outreach from SEL counselors as key contributors to a supportive school environment.

Instructional and Staff Support Strengthened:

Professional Development Reach and Effectiveness : Six targeted sessions reached all instructors, with structured implementation of strategies like visible learning goals and cognitive task analysis. Staff reported high relevance and practical use.

Zero Suspension/Expulsion Rates: Continued success maintaining 0% suspension and expulsion rates reflects a healthy and proactive school culture.

Strong ADA Performance : Average daily attendance remained very high at 99.3%.

Leadership Pathway: Purposeful pathways for staff growth strengthened confidence and implementation of new strategies.

Sage Oak's implementation of Goal 2 in 2024–2025 achieved strong results in the areas of school climate, live instructional practice, professional development success, and Socio-Emotional Learning resource access. Student retention increased significantly, reflecting stronger student commitment and improved systems of support. The continued emphasis on school safety, connection, and instructional quality—evident in overwhelmingly positive student, staff, and parent perceptions—demonstrates meaningful and sustained growth. Notably, positive feedback from the Parent Advisory Council reinforced the value of personalized academic support, strong advisor relationships, and visible SEL services. Together, these strengths reflect Sage Oak's deep commitment to student well-being and instructional excellence. These outcomes provide a solid foundation to refine retention strategies and deepen social-emotional engagement in the year ahead.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 2.4 related to increased expenditures for social and emotional support.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Highly Effective

The actions implemented under Goal 2—focused on building a supportive school climate, strengthening live synchronous instruction, and expanding SEL access—have been largely effective in meeting the goal's intended outcomes. Key indicators such as student retention, school safety, connection to mission, staff confidence, and Socio-Emotional Learning awareness all showed significant improvement, reflecting strong alignment between planned actions and measurable impact.

Enhancing Community Connection Opportunities - Highly Effective

This action supported campus-wide engagement systems that contributed to:

97 %+ of students and staff feel connected to the school mission;

Strong community perception scores: 90 %+ of families and students reported feeling valued, safe, and respected;

Continued 0% suspension and expulsion rates across all schools.

Student retention rate increased to 71%, positively impacting student achievement and engagement.

These outcomes suggest that the action was effective in fostering a positive and inclusive school environment.

Development of Professional Growth Pathways - Effective with Continued Potential

Participation in leadership pathways and professional development programs resulted in:

100% of participants reported increased confidence in using new strategies;

Staff retention among professional development participants improved to 83%, a strong indicator of job satisfaction and institutional alignment.

The action shows a clear impact on instructional culture and talent development. Ongoing refinement of professional development alignment with instructional practice will support even deeper results.

Enhancement of Professional Development for Live Instruction - Highly Effective

Six professional development sessions were conducted, surpassing the baseline of four.

Sessions were tailored using adult learning theory and emphasized role-based collaboration and implementation strategies.

Staff adopted new tools (e.g., Classkick, MagicSchool AI) and visible learning practices with high fidelity.

High perception of staff confidence in feeling equipped to perform their job based on the professional development received.

This action had a direct impact on instructional consistency and teacher preparedness for live, synchronous settings.

Development of Social and Emotional Support Systems - Strongly Effective

Synchronous SEL sessions more than doubled from 23 to 66, and:

Over 90% of families, students, and staff reported being informed about SEL resources.

SEL access and awareness improved, supporting chronic absenteeism rates well below 3%.

Sage Oak added dedicated teachers using LREBG funds to ensure every student has access to resources.

This action contributed meaningfully to the overall school climate and student engagement, particularly for students needing SEL Tier 1–2 support.

Conclusion

Most actions under Goal 2 were effective or highly effective in strengthening the school climate, increasing staff instructional capacity, and expanding SEL access. All actions under Goal 2 proved effective or highly effective in strengthening school climate, enhancing staff instructional capacity, expanding SEL access, and improving student retention.

These aligned efforts resulted in measurable gains across key indicators and reinforced the effectiveness of the school's strategic approach. The foundation built through this year's implementation sets a strong trajectory for continued success and deeper impact in the next LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Goal 2, Action 4 has been strengthened through the integration of Learning Recovery Emergency Block Grant (LREBG) funding to expand staffing and enhance the delivery of social-emotional supports and intervention services. This strategic use of funds supports increased access to counselors, SEL sessions, and individualized outreach for students requiring additional support—reflected in Metrics 2.13 and 2.14.

This enhancement enables Sage Oak to proactively meet the needs of a growing number of students identified for Tier 2 and Tier 3 social-emotional and academic interventions. The goal is to ensure every student has access to timely, responsive services that foster well-being, increase readiness to learn, and contribute to long-term academic success. These adjustments affirm Sage Oak's commitment to equity-driven, data-informed planning that empowers all students to thrive.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Enhancing Community Connection Opportunities	<p>Increase opportunities for parents, students, and staff to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision.</p> <p>This action is dedicated to increasing opportunities for meaningful engagement among parents, students, and school leadership. By fostering a deeper sense of community and ensuring alignment with the school's mission and vision, we aim to create an inclusive environment that supports professional growth and student success. Initiatives will include structured forums for feedback, engagement events, and clear communication channels that encourage active participation from all members of our school community.</p> <p>Metrics for Effectiveness:</p> <p>2.1 Community Engagement Perception: Measurement of the community's perception regarding the school's efforts to provide opportunities for involvement and input. This will be assessed through surveys asking if participants believe Sage Oak makes a significant effort to foster community engagement.</p> <p>2.2 Retention of Credentialed Teachers: Maintaining a 100% rate of credentialed teachers, ensuring that students have access to qualified and dedicated professionals.</p> <p>2.3 Attendance Rate Stability: Maintenance of school attendance rates at optimal levels, reflecting student engagement and a supportive learning environment.</p> <p>2.4 Low Chronic Absenteeism: Sustaining low rates of chronic absenteeism, indicating an engaging and welcoming school climate that motivates regular attendance.</p> <p>2.5 Low Suspension and Expulsion Rates: Keeping suspension and expulsion rates minimal, demonstrating effective behavior management and a positive school culture.</p> <p>2.6 Connection to School's Mission: Proportion of the school community that feels connected to the school's mission of empowering students, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives.</p> <p>2.7 Student Retention Rate Improvement: An increase in the student retention rate, indicating success in creating a supportive and engaging environment that encourages students to continue their education at Sage Oak.</p>	\$3,779,428.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>2.8 School Climate: Proportion of the school community that feels safe, respected and values, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives.</p> <p>Through these targeted actions and metrics, we aim to not only enhance the sense of community and engagement within our school but also to ensure that our educational environment is conducive to professional growth, student success, and sustained participation from our entire school community.</p>		
2.2	Development of Professional Growth Pathways	<p>Develop purposeful pathways for growth and opportunities for professional development.</p> <p>This action focuses on creating purposeful pathways for professional growth, offering expansive opportunities for all staff members to develop. By initiating comprehensive leadership and professional development programs, we aim to equip our staff with the skills and confidence necessary to innovate and enhance their respective practices across the board. This initiative is designed to cultivate a culture that values continuous learning, adaptability, and professional excellence, contributing significantly to the overall effectiveness and sustainability of our educational environment.</p> <p>Metrics for Effectiveness:</p> <p>2.9 Confidence and Integration of New Strategies: The proportion of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles. This will be assessed through surveys that inquire about their readiness to incorporate these strategies into future practices, reflecting the professional development programs' impact on enhancing staff capabilities.</p> <p>2.10 Retention Rates of Participating Staff: The retention rates of staff members who have participated in the professional development pathways will be closely monitored. A positive trend in these rates would indicate the success of the development opportunities in promoting job satisfaction, personal growth, and a strong commitment to the institution.</p>	\$1,345,936.00	Yes

Action #	Title	Description	Total Funds	Contributing
		This action underscores our dedication to fostering professional growth and development across all staff levels, enhancing our school's capacity to provide a high-quality, supportive, and engaging learning environment for all community members.		
2.3	Enhancement of Professional Development for Live Instruction	<p>Increase professional development for live instruction.</p> <p>This action targets the expansion of professional development opportunities tailored to live instruction, aiming to empower our staff with the skills and techniques necessary for dynamic and effective real-time teaching. By providing a diverse array of training sessions, workshops, and seminars focused on live instructional strategies, we are committed to ensuring that all staff members feel confident and well-prepared to engage students in a live setting. This initiative is designed to elevate the quality of live instruction, ensuring that our educational delivery is both impactful and engaging.</p> <p>Metrics for Effectiveness:</p> <p>2.11 Expansion of Professional Development Opportunities: Tracking the increase in professional development opportunities offered to staff, focusing on live instruction. This metric will encompass school-created programs and external training opportunities included in our professional development portfolio.</p> <p>2.12 Staff Confidence in Job Performance: The percentage of staff who believe they are well-equipped by Sage Oak to perform their roles effectively, particularly in the context of live instruction, based on the professional development received. This will be measured through surveys assessing staff perceptions of their preparedness and the adequacy of professional development support provided by the school.</p> <p>Through this targeted approach to professional development, we aim to not only enhance the effectiveness of live instruction but also to foster a culture of continuous learning and adaptability among our staff. This action</p>	\$224,324.00	Yes

Action #	Title	Description	Total Funds	Contributing
		reaffirms our commitment to supporting professional excellence and student success in every live instructional encounter.		
2.4	Development of Social and Emotional Support Systems	<p>Develop a system to increase access and consistency for social and emotional resources and interventions.</p> <p>This action is dedicated to developing a comprehensive system designed to increase access to and consistency of social and emotional resources and interventions for our school community. Recognizing the critical importance of social and emotional well-being in educational success, we aim to ensure that students, parents, and teachers are well-informed and have easy access to the support services they need. Through this initiative, we will enhance our existing resources, introduce new interventions, and expand synchronous support opportunities, such as groups or classes led by counselors, to address the diverse needs of our community effectively.</p> <p>Additionally, this action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our counseling offerings.</p> <p>Metrics for Effectiveness:</p> <p>2.13 Awareness of Socio-Emotional Resources: The percentage of parents, students, and teachers that report feeling informed about the social and emotional resources provided by Sage Oak. This measure will assess the effectiveness of our communication strategies and the accessibility of our resources.</p> <p>2.14 Expansion of Synchronous Support Opportunities: The increase in the number of synchronous support groups or classes with counselors, reflecting our commitment to providing real-time, interactive support sessions that cater to the emotional and social needs of our students.</p> <p>By implementing this action, we aim to create a nurturing and supportive environment that prioritizes the social and emotional well-being of our</p>	\$353,460.00	Yes

Action #	Title	Description	Total Funds	Contributing
		students. This comprehensive support system will not only address immediate needs but also contribute to the long-term resilience and success of our school community.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	<p>Conditions of Learning: Efficient Operations with a Focus on Sustainability</p> <p>Leverage technologies, specifically Artificial Intelligence, to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency.</p>	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Understanding the importance of future-proofing its educational approach, Sage Oak integrates robust systems that prioritize sustainability and efficiency into its strategic plan. This initiative focuses on streamlining operations, optimizing resources, and adopting sustainable practices, aligning with the school's mission and values. By leveraging Artificial Intelligence and other advanced technologies, Sage Oak aims to provide personalized learning pathways, ensuring education is more accessible, engaging, and effective for students. This forward-thinking approach prepares the Sage Oak community for a rapidly evolving educational landscape, embodying the school's commitment to innovation and excellence.

Sage Oak's current staff-to-student ratio of 13:1 highlights our dedicated investment in staffing to ensure personalized learning. With efforts to enhance operational efficiency, we anticipate a more optimized staff-to-student ratio. This adjustment will enable us to extend our educational reach without compromising the quality of instruction. By streamlining administrative tasks, teachers can dedicate more attention to enriching student interactions, further improving the educational experience. This strategic approach ensures that resources are maximized for the direct benefit of our students, aligning with our mission to provide high-quality, focused education.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Staff to Student Ratio Improvement staff to student ratio	13:1 Source: Internal 22-23	13:1		19:1	0
3.2	Improved Work Efficiency and Satisfaction % of leadership staff reporting noticeable improvements in work efficiency and satisfaction	93% Source: Internal 23-24	92%		90% or higher	-1%
3.3	Increased Staff Confidence in Using AI Tools % of staff reporting confidence in their ability to use AI tools to improve learning outcomes	79% Source: Internal 23-24	91%		90%	12%

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Goal 3 was developed to promote efficient, sustainable school operations and innovative instructional systems through the strategic integration of Artificial Intelligence (AI) and other advanced technologies. These systems were designed to streamline internal processes,

improve staff productivity, and empower educators to deliver personalized learning pathways for students. The focus for 2024–2025 was on establishing foundational tools and practices that enhance both operational efficiency and academic effectiveness.

Two primary actions drove implementation:

Technology Optimization for Enhanced Operations, targeting back-end systems and staff workflows.

AI-Driven Personalized Learning Implementation, aimed at increasing staff capacity to use AI tools for instructional planning and student support.

These efforts laid the groundwork for increased staff satisfaction, improved staff-to-student ratios, and an innovative educational model responsive to student needs.

While all major action steps were initiated, there were a few substantive implementation shifts and enhancements:

Focus on Foundational AI Training: Although AI tools were introduced with the intent of deep classroom integration, Year 1 focused more heavily on building staff confidence and familiarity with AI tools like MagicSchool AI and ChatGPT for lesson planning and data analysis, rather than direct instructional use. This adjustment was intentional and acknowledged the steep learning curve for many educators.

Technology Integration for Support Functions: Implementation also prioritized the automation of routine tasks (e.g., calendaring, internal form processing, survey analysis) before full integration into student-facing systems. This choice maximized short-term impact on operational efficiency while giving instructional teams time to build readiness.

Minor Challenges Encountered

Staff Learning Curve with AI Tools: A key challenge was the varying levels of technology comfort among staff, especially when shifting from traditional tools to AI-enhanced platforms. While professional development was provided, some staff required additional time and support to adopt new workflows.

Complexity of Measuring AI Impact on Student Learning: While staff confidence and operational workflows showed visible improvements, the direct impact of AI on student learning outcomes was harder to isolate and quantify within the first year. This limited the ability to fully assess the academic effectiveness of personalized AI-driven learning strategies.

System Integration and Scalability: Implementing scalable, unified platforms across all school sites proved more complex than anticipated. Aligning digital systems with existing workflows required ongoing coordination between technology, instruction, and administration teams.

Successes in Implementation

Positive Staff-to-Student Ratio Trends: The staff-to-student ratio remains at 13:1, consistent with the baseline from prior years. While the target ratio of 19:1 remains a future goal tied to long-term automation and operational streamlining, the metric has not yet shifted. This underscores that 2024–2025 was a foundational year, focused on building the systems and capacity necessary to enable future scaling.

Staff Satisfaction and Operational Efficiency Gains: Internal surveys showed that 92% of targeted staff reported improvements in work efficiency and satisfaction. Streamlining scheduling, attendance tracking, and instructional prep with AI-supported tools significantly reduced time on routine tasks.

Staff Confidence in AI Readiness: 91% of staff reported confidence in using AI tools to improve learning outcomes—a foundational win that sets the stage for more advanced applications in Year 2.

Instructional Adaptability: Staff began incorporating AI tools into lesson planning, progress monitoring, and assessment feedback. This adaptability helped align personalized learning strategies to individual student needs, especially in virtual and hybrid learning contexts.

The first year of Goal 3 implementation laid a strong operational and instructional foundation for long-term sustainability and innovation. While some of the deeper academic impacts of AI-driven personalization will require continued development and measurement, the improvements in staff efficiency, tool readiness, and system scalability are already enhancing learning conditions across campuses. These successes confirm that Sage Oak is well-positioned to expand AI use and maximize its impact on teaching, learning, and operational excellence in the years ahead.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

No material differences.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The specific actions under Goal 3—focused on technology optimization and AI-driven personalized learning—were implemented and show emerging effectiveness. While most measurable outcomes are still in early stages or pending full implementation, important groundwork was laid to support future gains in operational efficiency, instructional innovation, and scalable systems.

Technology Optimization for Enhanced Operations - Strongly Effective

This action centered on streamlining Sage Oak's internal operations using automation and smarter technology workflows. While staff-to-student ratio improvements (from the baseline of 13:1) were maintained from year 1, the implementation of AI-assisted scheduling, form processing, and internal workflow tools significantly improved work satisfaction and productivity.

92% of staff surveyed reported improved work efficiency and satisfaction, indicating a continual shift toward more streamlined operations. Automation tools were deployed to reduce administrative burden, though the longitudinal impact on staffing efficiency will be more visible in Years 2–3.

AI-Driven Personalized Learning Implementation - Foundational Progress with Early Signs of Impact

91% of staff reported confidence in using AI tools to support instruction, 12 points up from the baseline, signaling strong early uptake.

AI tools were successfully incorporated into lesson planning, formative assessment, and curriculum design in limited pilot settings. Broader adoption into instructional practice is still in progress and will require additional professional development and model-sharing in Year 2. Staff confidence has grown substantially, positioning this action as effective in building capacity, though full implementation and measurable student outcomes are still forthcoming.

Actions under Goal 3 show early-stage effectiveness, particularly in building staff readiness and improving operational workflows. Staff satisfaction and AI tool adoption are trending positively, which lays a solid foundation for Year 2 impact. However, metrics like staff-to-student ratio and academic impact of personalized AI strategies remain aspirational targets, with outcomes expected to materialize as systems mature.

Continued professional development, targeted AI use cases, and a strategic focus on scalability will be essential to turning this year’s investments into long-term, measurable improvements in both operations and learning outcomes.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes were made to the planned goal, metrics, target outcomes, or action for the coming year.

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Technology Optimization for Enhanced Operations	<p>Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.</p> <p>This action is centered on the critical evaluation, integration, and optimization of technology, with a particular emphasis on Artificial Intelligence (AI), to streamline and automate operational processes and procedures across our institution. By harnessing advanced technologies, we aim to significantly improve operational efficiency, reduce manual workload, and foster an environment that supports sustainable growth and academic excellence. This initiative will involve a comprehensive review of current technologies, identification of automation opportunities, and the strategic implementation of technological solutions to meet our operational goals.</p> <p>Metrics for Effectiveness:</p> <p>3.1 Staff-to-Student Ratio Improvement: Monitoring changes in the staff-to-student ratio as a direct outcome of technological optimizations, aiming for a more effective and efficient distribution of resources.</p> <p>3.2 Work Efficiency and Satisfaction: The percentage of staff reporting noticeable improvements in work efficiency and satisfaction following the implementation of new technology solutions. This metric will be assessed through surveys designed to capture staff perceptions of the impact of</p>	\$2,685,440.00	No

Action #	Title	Description	Total Funds	Contributing
		<p>technological advancements on their daily operations and overall job satisfaction.</p> <p>Through this initiative, we aim to leverage cutting-edge technology to create a more streamlined, efficient, and sustainable operational framework that supports our educational mission and enhances the conditions of learning for our students and staff.</p>		
3.2	AI-Driven Personalized Learning Implementation	<p>Implement AI-driven personalized learning strategies to maximize student learning.</p> <p>This action aims to implement Artificial Intelligence (AI)-driven personalized learning strategies to maximize student learning outcomes. By harnessing the power of AI, we plan to tailor educational content and instruction to meet the individual needs of each student, thereby enhancing learning efficiency, engagement, and academic achievement. This initiative will involve training staff to effectively use AI tools and integrate them into our curriculum to provide a more adaptive and responsive learning experience for students.</p> <p>Metrics for Effectiveness:</p> <p>3.3 Staff Confidence in Using AI Tools: The percentage of staff reporting confidence in their ability to use AI tools to improve learning outcomes, based on the training received. This metric will assess the effectiveness of professional development programs in equipping staff with the necessary skills to implement AI-driven instructional strategies.</p> <p>Through the adoption of AI-driven personalized learning strategies, we aim to create a more engaging, inclusive, and effective educational environment that caters to the diverse learning styles and needs of our students, thereby supporting our mission of fostering academic growth and operational efficiency.</p>	\$366,766.00	Yes

Action #	Title	Description	Total Funds	Contributing

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2025-26]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$3,453,386	\$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
\$ 39,557,732	0.000%	\$0.00	

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	<p>Action: Integration of Career, Community, and Life Skills</p> <p>Need: All students, including unduplicated students, require enhanced access to career, community, and life skills education due to historical inequities and limited access to external resources.</p>	This action provides enhanced access to career, community, and life skills education through dedicated synchronous courses and counseling supports (Action 1.1). While offered LEA-wide, the curriculum and support are intentionally designed with differentiated content and targeted outreach to ensure unduplicated students, who historically have less access to these resources, receive services that are increased in intensity and improved in quality and relevance compared to a universal offering without these targeted elements.	Completion of A-G Requirements, Career Technical Education (CTE) Pathway Completion, Percentage of Students Achieving a Score of 3 or Higher on AP Exams.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	This is the most effective approach to ensure equitable access and outcomes across the geographically diverse LEA.	
1.2	Action: Refinement of Multi-Tiered System of Support Need: Unduplicated students demonstrate persistent academic achievement gaps and socio-emotional needs requiring intensified and differentiated support. Scope: LEA-wide	This action refines the LEA-wide MTSS to provide increased levels of targeted, small-group instruction and improved socio-emotional supports (Action 1.2), particularly for unduplicated students identified through data analysis. The LEA-wide scope ensures consistent access to these tiered interventions across all locations, but the design and resource allocation (including LREBG-funded staffing) are principally directed towards and intensified for unduplicated pupils to accelerate their academic growth and address well-being challenges more effectively than a universal support system.	Performance in iReady Assessments for ELA and Math, and CAASPP Achievement for English learners, foster youth, and low-income students.
2.1	Action: Enhancing Community Connection Opportunities Need: Foster youth, English learners, and low-income students often face barriers to full participation in school activities, which can affect their sense of belonging and engagement with the school community. Scope: LEA-wide	Increasing community connection opportunities addresses this need by creating inclusive, accessible engagement activities that encourage participation from all students and their families, regardless of background. This action aims to build a stronger, more cohesive school community where unduplicated students feel valued and supported.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.2	Action:	Providing professional growth pathways for all educators ensures a high-quality educational	Increased Confidence and Integration of New

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	<p>Development of Professional Growth Pathways</p> <p>Need: Educators require ongoing professional development to effectively meet the diverse needs of all students, fostering an engaging and supportive learning environment.</p> <p>Scope: LEA-wide</p>	experience for every student, including unduplicated students. This school wide action supports the continuous improvement of teaching strategies that directly benefit these groups by enhancing educators' skills and knowledge.	Strategies by staff, and retention rates of participating staff, which indirectly reflect the improved educational environment for unduplicated students.
2.3	<p>Action: Enhancement of Professional Development for Live Instruction</p> <p>Need: Effective live instruction requires specific pedagogical skills, particularly to engage unduplicated students who may have varied learning needs and preferences.</p> <p>Scope: LEA-wide</p>	Enhancing professional development for live instruction across the LEA ensures that all educators are equipped to deliver engaging, high-quality live instruction that caters to the diverse needs of all students, including unduplicated groups. This approach is crucial for maintaining student engagement and improving learning outcomes.	Expansion of Professional Development Opportunities focusing on live instruction, and improvement in staff confidence in job performance, particularly in engaging and instructing unduplicated students effectively.
2.4	<p>Action: Development of Social and Emotional Support Systems</p> <p>Need: Unduplicated students, particularly foster youth, English learners, low-income, and homeless students, face significant socio-emotional barriers impacting their educational success.</p>	This action develops an LEA-wide system to increase access to and improve the consistency and targeting of social and emotional resources and interventions (Action 2.4). While available to all, the system is designed with specific components, such as dedicated counselor support and tailored interventions (including LREBG-funded staffing), that are principally directed towards and intensified for unduplicated students to address their unique and heightened socio-	Awareness of Socio-Emotional Resources, Expansion of Synchronous Support Opportunities

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	emotional needs more effectively than a universal approach. The LEA-wide scope ensures equitable access to these intensified supports across all locations.	
3.2	Action: AI-Driven Personalized Learning Implementation Need: English learners and low-income students, in particular, benefit from personalized learning strategies that tailor instruction to their unique needs and learning styles, addressing gaps in knowledge and accelerating progress. Scope: LEA-wide	Implementing AI-driven personalized learning strategies on a schoolwide basis ensures that all students, especially unduplicated students, receive customized educational experiences designed to maximize their learning potential. This approach is critical for closing achievement gaps and supporting the academic growth of each student.	Increased Staff Confidence in Using AI Tools, Staff to Student Ratio Improvement, Improved Work Efficiency and Satisfaction.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
1.5	Action:	This action is specifically tailored to address the needs of English learners and LTELs by	Improvement in ELPAC scores, an increase in the

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
	<p>Enhancing English Learner Proficiency and Reclassification</p> <p>Need: English learners and Long-Term English learners (LTELs) face specific challenges in achieving language proficiency, which is crucial for academic success and full participation in school activities. There is a need for targeted interventions to accelerate English language development and facilitate timely reclassification. Additionally, there is a need for an increased number of professional development opportunities supporting English language development and LTEL instruction.</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	<p>maintaining participation in synchronous instruction focused on language development. It aims to provide personalized and engaging learning experiences that support language acquisition, academic achievement, and reclassification. By supporting these synchronous instruction opportunities, English learners receive the focused support necessary to improve their English proficiency, thereby enhancing their overall educational experience and outcomes. Increased professional development opportunities will strategically impact synchronous instruction and provide targeted tools to support English learners and LTELs.</p>	<p>reclassification rate of English learners and LTELs, increased participation rates in targeted synchronous instruction, and an increase in applicable professional development.</p>

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

n/a

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	n/a	n/a
Staff-to-student ratio of certificated staff providing direct services to students	n/a	n/a

2025-26 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	\$ 39,557,732	\$3,453,386	\$ 39,557,732	0.000%	

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$44,607,473.00	\$13,263,556.00	\$0.00	\$650,363.00	\$58,521,392.00	\$43,612,606.00	\$14,908,786.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Integration of Career, Community, and Life Skills	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$35,124,509.00	\$9,935,274.00	\$35,530,454.00	\$9,411,231.00	\$0.00	\$118,098.00	\$45,059,783.00	
1	1.2	Refinement of Multi-Tiered System of Support	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$3,771,896.00	\$278,959.00	\$1,624,313.00	\$1,894,277.00	\$0.00	\$532,265.00	\$4,050,855.00	
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	Students with Disabilities	No			All Schools	Fiscal 2025-26	\$0.00	\$655,400.00	\$11,400.00	\$644,000.00	\$0.00	\$0.00	\$655,400.00	
1	1.4	Unified Articulation Process Development	All	No			All Schools	Fiscal 2025-26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
1	1.5	Enhancing English Learner Proficiency and Reclassification	English Learners	Yes	Limited to Unduplicated Student Group(s)	English Learners	All Schools	Fiscal 2025-26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
2	2.1	Enhancing Community Connection Opportunities	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$3,466,311.00	\$313,117.00	\$3,763,086.00	\$16,342.00	\$0.00	\$0.00	\$3,779,428.00	
2	2.2	Development of Professional Growth Pathways	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$1,345,936.00	\$600,275.00	\$745,661.00	\$0.00	\$0.00	\$1,345,936.00	
2	2.3	Enhancement of Professional Development for Live Instruction	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$224,324.00	\$224,324.00	\$0.00	\$0.00	\$0.00	\$224,324.00	

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
2	2.4	Development of Social and Emotional Support Systems	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$353,460.00	\$0.00	\$0.00	\$353,460.00	\$0.00	\$0.00	\$353,460.00	
3	3.1	Technology Optimization for Enhanced Operations	All	No			All Schools	Fiscal 2025-26	\$896,430.00	\$1,789,010.00	\$2,612,688.00	\$72,752.00	\$0.00	\$0.00	\$2,685,440.00	
3	3.2	AI-Driven Personalized Learning Implementation	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income		Fiscal 2025-26	\$0.00	\$366,766.00	\$240,933.00	\$125,833.00	\$0.00	\$0.00	\$366,766.00	

2025-26 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$ 39,557,732	\$3,453,386	\$ 39,557,732	0.000%		\$41,983,385.00	0.000%	0.000 %	Total:	\$41,983,385.00
								LEA-wide Total:	\$41,983,385.00
								Limited Total:	\$0.00
								Schoolwide Total:	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Integration of Career, Community, and Life Skills	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$35,530,454.00	
1	1.2	Refinement of Multi-Tiered System of Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$1,624,313.00	
1	1.5	Enhancing English Learner Proficiency and Reclassification	Yes	Limited to Unduplicated Student Group(s)	English Learners	All Schools	\$0.00	
2	2.1	Enhancing Community Connection Opportunities	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$3,763,086.00	
2	2.2	Development of Professional Growth Pathways	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$600,275.00	
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$224,324.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
2	2.4	Development of Social and Emotional Support Systems	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$0.00	
3	3.2	AI-Driven Personalized Learning Implementation	Yes	LEA-wide	English Learners Foster Youth Low Income		\$240,933.00	

2024-25 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$45,401,106.00	\$45,010,954.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Integration of Career, Community, and Life Skills	Yes	\$35,626,169.00	\$36,137,303.00
1	1.2	Refinement of Multi-Tiered System of Support	Yes	\$2,951,900.00	\$2,276,007.00
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	No	\$563,805.00	\$656,180.00
1	1.4	Unified Articulation Process Development	No	\$700.00	\$0.00
1	1.5	Enhancing English Learner Proficiency and Reclassification	Yes	\$8,090.00	\$0.00
2	2.1	Enhancing Community Connection Opportunities	Yes	\$3,109,885.00	\$2,773,832.00
2	2.2	Development of Professional Growth Pathways	Yes	\$690,363.00	\$660,228.00
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	\$208,622.00	\$175,519.00
2	2.4	Development of Social and Emotional Support Systems	Yes	\$359,701.00	\$778,192.00
3	3.1	Technology Optimization for Enhanced Operations	No	\$1,710,330.00	\$1,321,221.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
3	3.2	AI-Driven Personalized Learning Implementation	Yes	\$171,541.00	\$232,472.00

2024-25 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$5,449,361.00	\$33,377,386.00	\$34,644,918.00	(\$1,267,532.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Integration of Career, Community, and Life Skills	Yes	\$27,912,176.00	\$29,291,756.00		
1	1.2	Refinement of Multi-Tiered System of Support	Yes	\$1,464,919.00	\$943,791.00		
1	1.5	Enhancing English Learner Proficiency and Reclassification	Yes	\$8,090.00	\$0.00		
2	2.1	Enhancing Community Connection Opportunities	Yes	\$3,109,885.00	\$2,773,832.00		
2	2.2	Development of Professional Growth Pathways	Yes	\$493,909.00	\$480,610.00		
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	\$208,622.00	\$175,519.00		
2	2.4	Development of Social and Emotional Support Systems	Yes	\$8,244.00	\$746,938.00		
3	3.2	AI-Driven Personalized Learning Implementation	Yes	\$171,541.00	\$232,472.00		

2024-25 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$40,320,401.00	\$5,449,361.00	0	13.515%	\$34,644,918.00	0.000%	85.924%	\$0.00	0.000%

Local Control and Accountability Plan Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at LCFF@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in EC sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statutes of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2025-26, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
 - If the LEA has unexpended LREBG funds the LEA must provide the following:
 - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
 - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
 - An explanation of how the action is aligned with the allowable uses of funds identified in [EC Section 32526\(c\)\(2\)](#); and
 - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by [EC Section 32526\(d\)](#).
 - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the [LREBG Program Information](#) web page.
 - Actions may be grouped together for purposes of these explanations.
 - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
 - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32526(d), to provide the information identified above or to include actions funded with LREBG funds within the 2025-26, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Requirements

Requirements

School districts and COEs: [EC Section 52060\(g\)](#) and [EC Section 52066\(g\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Charter schools: [EC Section 47606.5\(d\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062](#);
 - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see [Education Code Section 52068](#); and
- For charter schools, see [Education Code Section 47606.5](#).

- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
 - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
 - Inclusion of metrics other than the statutorily required metrics
 - Determination of the target outcome on one or more metrics
 - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
 - Inclusion of action(s) or a group of actions
 - Elimination of action(s) or group of actions
 - Changes to the level of proposed expenditures for one or more actions
 - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
 - Analysis of effectiveness of the specific actions to achieve the goal
 - Analysis of material differences in expenditures
 - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
 - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
 - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
 - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
 - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
 - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: [EC Section 42238.024\(b\)\(1\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad Goal

Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.

- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.
- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
 - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
 - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.
- **Required metrics for actions supported by LREBG funds:** To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.
 - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> • Enter the metric number.
Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
 - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
 - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
 - Indicate the school year to which the baseline data applies.
 - The baseline data must remain unchanged throughout the three-year LCAP.
 - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
 - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
 - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- **Note for Charter Schools:** Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
 - **Note for Charter Schools:** Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
 - **Note for Charter Schools:** Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 . Leave blank until then.	Enter information in this box when completing the LCAP for 2026–27 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 and 2026–27 . Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
 - Include a discussion of relevant challenges and successes experienced with the implementation process.
 - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
 - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
 - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
 - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
 - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
 - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
 - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
 - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
 - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
 - Professional development for teachers.
 - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
 - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
 - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
 - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to [EC Section 32526\(d\)](#). For information related to the required needs assessment please see the Program Information tab on the [LREBG](#)

[Program Information](#) web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the [California Statewide System of Support LREBG Resources](#) web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32526(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in [EC Section 32526\(c\)\(2\)](#).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
 - Identify the action as an LREBG action;
 - Include an explanation of how research supports the selected action;
 - Identify the metric(s) being used to monitor the impact of the action; and
 - Identify the amount of LREBG funds being used to support the action.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 CCR Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

Total Projected LCFF Supplemental and/or Concentration Grants

2025-26 Local Control and Accountability Plan for Sage Oak Charter School

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.
- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

2025-26 Local Control and Accountability Plan for Sage Oak Charter School

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
 - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
 - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to EC Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
 - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
 - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Local Control and Accountability Plan (LCAP) Every Student Succeeds Act (ESSA) Federal Addendum Template

School Year

2025-2026

Date of Board Approval

6/18/25

LEA Name

Sage Oak Charter School

CDS Code:

36-67736-0136069

Link to the LCAP:

(optional)

For which ESSA programs apply to your LEA?

Choose From:

TITLE I, PART A

Improving Basic Programs Operated by
State and Local Educational Agencies

TITLE II, PART A

Supporting Effective Instruction

TITLE IV, PART A

Student Support and Academic
Enrichment Grants

(note: This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)

In the following pages, ONLY complete the sections for the corresponding programs.

Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding. LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

The LEA must address the Strategy and Alignment prompts provided on the following page.

Each provision for each program must be addressed unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template**.

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development**. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sage Oak Charter School strategically utilizes federal funds to supplement and enhance local priorities and initiatives funded with state funds, as detailed in our Local Control and Accountability Plan (LCAP). This strategic allocation ensures that federal resources are effectively supporting specific goals within our school community, aligning closely with our broader educational objectives.

Federal funds under Title I, Part A are targeted toward Goal 1 actions aimed at enhancing College and Career Readiness programs. These funds specifically support socioeconomically disadvantaged students by enhancing academic interventions and providing resources that facilitate both college and career readiness. For Goal 2, Title II, Part A funds are allocated to augment professional development programs, including extensive training for educators on differentiated instruction and effective strategies to engage students with diverse learning needs. This ensures that our teaching staff can implement the educational strategies identified in the LCAP effectively. Additionally, under Goal 3, Title IV, Part A funds align with the focus on leveraging technologies to enhance personalized learning pathways. These funds support the integration of advanced technological tools and programs that support a well-rounded education, including enhancing STEM education, supporting arts programs, and providing comprehensive mental health services.

The rationale behind these specific allocations of federal funds is supported by research that shows targeted interventions in areas such as reading and math can close achievement gaps, particularly for low-income students. Studies consistently indicate a strong correlation between teacher qualifications, their ongoing professional development, and student success. This underscores the necessity of equipping teachers with advanced skills and knowledge. Furthermore, engagement in arts and STEM has been linked to higher academic performance and motivation, while robust mental health support is essential for overall student success and well-being.

By ensuring that federal funds are aligned with the specific goals and actions outlined in our LCAP, Sage Oak Charter School maximizes the impact of these resources. This approach not only meets federal and state compliance requirements but also significantly advances our mission to provide a high-quality, equitable, and comprehensive education to all students, fostering both academic excellence and personal growth.

Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sage Oak Charter School ensures the effective alignment of federal funds with activities funded by state and local funds, and where applicable, across different federal grant programs, through a series of strategic efforts:

We engage in an integrated planning and budgeting process that includes stakeholders from all levels of the organization. This collaborative approach ensures that all sources of funding—federal, state, and local—are considered collectively to create a unified resource allocation strategy. This integrated planning is crucial for aligning the objectives across different funding streams and maximizing the impact of each dollar spent.

In addition, we coordinate activities across different federal grant programs, such as Title I, Title II, and Title IV, to leverage synergies and amplify the effects of these funds. By identifying overlapping goals and complementary activities, resources from these programs can be pooled to support broader educational initiatives, enhancing the cohesion and effectiveness of our efforts.

Our decision-making process is strongly data-driven, relying on regular data collection and analysis to assess the effectiveness of funded programs and to adjust strategies as necessary. This allows us to align federal funds closely with the specific needs identified through state and local assessments, ensuring resources are targeted to areas of greatest need.

Stakeholder engagement is also a cornerstone of our approach. By involving a wide range of stakeholders, including parents, teachers, and community members, in the funding decision-making process, we ensure that the allocation of resources reflects the priorities and needs of our school community, thereby increasing the relevance and impact of the funded programs.

Lastly, continuous monitoring and regular reporting on the use and impact of funds ensure transparency and accountability. This not only helps in making necessary adjustments to align the use of federal, state, and local funds effectively but also ensures that activities across different federal grant programs are well-coordinated and directed toward our common educational goals.

Through these efforts, Sage Oak Charter School fosters a strategic and effective use of all funding sources, ensuring that federal funds not only meet regulatory requirements but also significantly enhance our educational initiatives funded by state and local revenues. This strategic alignment supports our overarching goal of providing high-quality, equitable, and comprehensive education to all students

ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

TITLE I, PART A

Monitoring Student Progress Towards Meeting Challenging State Academic Standards

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(1) (A–D)	1, 2, 4, 7, 8 (<i>as applicable</i>)

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

- (A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
- (B) identifying students who may be at risk for academic failure;
- (C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
- (D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

Overuse in Discipline Practices that Remove Students from the Classroom

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(11)	6 (<i>as applicable</i>)

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

Career Technical and Work-based Opportunities

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(12)(A–B)	2, 4, 7 (<i>as applicable</i>)

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

- (A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
- (B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

TITLE II, PART A

Title II, Part A Activities

ESSA SECTION	STATE PRIORITY ALIGNMENT
2102(b)(2)(A)	1, 2, 4 <i>(as applicable)</i>

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

TITLE III, PART A**Parent, Family, and Community Engagement**

ESSA SECTION	STATE PRIORITY ALIGNMENT
3116(b)(3)	3, 6 (<i>as applicable</i>)

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

TITLE I, PART A

Poverty Criteria

ESSA SECTION(S)	STATE PRIORITY ALIGNMENT
1112(b)(4)	N/A

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Sage Oak utilizes specific poverty criteria under Section 1113, in compliance with the Every Student Succeeds Act (ESSA) provisions detailed in Title I, Part A. This process is part of our annual reporting through the Consolidated Application and Reporting System (CARS), ensuring transparency and adherence to federal guidelines.

As a nonclassroom-based charter school, we operate as a single LEA. We use the percentage of students eligible for the Household Data Collection (HDC) as our primary poverty criterion. Additionally, we consider other socio-economic indicators such as parental income levels. By combining these data points, Sage Oak can more accurately identify student groups that require additional support, allowing for more targeted resource allocation. This method provides a comprehensive measure of socio-economic disadvantage within our community.

This approach not only helps in directing resources to improve educational equity but also aligns with our broader commitment to providing supportive educational environments for all students, particularly those facing economic challenges. Through careful and systematic analysis of poverty indicators, Sage Oak ensures that federal funding is utilized effectively to enhance educational opportunities and outcomes for our most disadvantaged populations.

ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

TITLE I, PART A

Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDE's website (<https://www.cde.ca.gov/pd/ee/peat.asp>) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
 - a. Number of low-income students
 - b. Number of minority students
2. Does the LEA have an educator equity gap –
 - a. If yes, must create a plan which must include root cause analysis of the disparity
 - b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available [here](#).

THIS ESSA PROVISION IS ADDRESSED BELOW:

n/a

On November 6, 2019, the SBE approved updated definitions for “ineffective” and “out-of-field” teachers to be included in the amended California ESSA Consolidated State Plan.

Term	Definition
Ineffective teacher	<p>An ineffective teacher is any of the following:</p> <ul style="list-style-type: none"> • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or • A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned) • An individual who holds no credential, permit, or authorization to teach in California. <p>Under this definition, teachers with the following limited emergency permits would be considered ineffective:</p>

	<ul style="list-style-type: none"> • Provisional Internship Permits, • Short-Term Staff Permits • Variable Term Waivers <p>Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record</p>
Out-of-field teacher	<p>A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field:</p> <ul style="list-style-type: none"> • General Education Limited Assignment Permit (GELAP) • Special Education Limited Assignment Permit (SELAP) • Short-Term Waivers • Emergency English Learner or Bilingual Authorization Permits <p>Local Assignment Options (except for those made pursuant to the <i>California Code of Regulations</i>, Title 5, Section 80005[b])</p>
Inexperienced Teacher	A teacher who has two or fewer years of teaching experience.
Minority Student	A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic.
Low-Income Student	A student who is eligible to receive Free or Reduced-Price Meals

Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sage Oak implements effective parent and family engagement through strategic communication and collaborative initiatives under Section 1116. We have established a comprehensive engagement policy, developed with direct input from parents, ensuring that strategies are aligned with the needs and expectations of our school community. This policy guides our efforts to provide parents with clear, accessible information about academic standards, assessments, and student progress, empowering them to support their children's education effectively.

Our approach includes providing resources to help parents understand curriculum demands and enhance their ability to assist with learning activities. We also educate our staff on the importance of parental involvement, training them to engage with families as equal partners in education. Through regular updates and transparent communication, we keep parents informed and involved in school activities, decision-making processes, and the development of support plans for students.

Additionally, Sage Oak integrates parent and family engagement strategies with other federal, state, and local programs to enhance the educational support network available to our students.

To meet this requirement, LEAs must provide a description of the following:

ESSA Section 1112(b)(3): how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans
3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

ESSA Section 1112(b)(7): the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))
6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14)).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Sage Oak is dedicated to enhancing engagement through a comprehensive strategy that ensures the active participation of parents and families in their children's education. Our approach aligns with Section 1116 of ESSA, focusing on creating inclusive, supportive, and informative engagement practices that bridge communication gaps between the school and home environments. This alignment is seamlessly integrated with our LCAP educational partner engagement process, ensuring a unified approach to stakeholder involvement.

We have developed a robust parent and family engagement policy in close collaboration with families, ensuring it reflects their needs and perspectives. This policy is approved by the parent advisory committee and distributed annually emphasizing clarity and comprehensibility. To assist parents in understanding the challenging state academic standards, state and local academic assessments, and other educational requirements, we provide informational sessions that are crucial for empowering them to support their children's academic progress effectively.

At Sage Oak, we prioritize making education accessible and engaging. Our staff is trained to value and integrate parental contributions, working with parents as equal partners in the educational process. Our parent involvement programs are coordinated with other federal, state, and local services, enhancing the resources available to our families.

Through regular updates and proactive communication using various platforms—including emails, our website, and social media—we ensure that all families are well-informed and prepared to participate in school activities and decision-making processes. Our engagement strategies are aligned with our LCAP goals, ensuring that parental input is an integral part of our educational planning and evaluation processes.

In aligning these efforts with our LCAP educational partner engagement process, we ensure that parent and family engagement strategies are integral to our broader educational planning. This involves incorporating parent feedback into LCAP development and review, ensuring that our strategic planning reflects the community's voice and needs. By integrating the requirements of Section 1116 into our LCAP process, we enhance the educational experience for all

students and foster a supportive community that is deeply involved in our educational mission. This approach is consistent with Sage Oak's educational model, which emphasizes personalized, flexible learning environments that engage and empower our students and their families.

Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA's schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

At Sage Oak, we are committed to providing a wide array of programs under sections 1114 and 1115 of ESSA, designed to support and enhance the educational experiences of all students, including those who are neglected or delinquent. These programs are tailored to meet the diverse needs of our student population and are implemented with the goal of ensuring every student has access to high-quality education that prepares them for success in college, career, and life.

Our schoolwide programs focus on comprehensive strategies that improve the entire educational program, making them more responsive to the needs of our students, particularly those who are at risk of failing academic standards. These programs integrate various funding sources to support initiatives such as enhanced instructional methods, integrated technology, and expanded professional development for teachers. The overarching goal is to raise the academic achievement of all students by improving the entire school's instructional and operational effectiveness.

For students specifically identified as needing extra academic support, we have targeted assistance programs. These programs provide supplementary educational services to help raise the academic achievement of students at risk of failing. Services include personalized tutoring, intervention programs in reading and math, credit recovery courses, and additional support services tailored to the needs of individual students. These targeted efforts focus on students who are the furthest from meeting the standards the school sets for all children.

If applicable, for children living in local institutions for the neglected or delinquent, Sage Oak will offer educational services designed to address their unique educational and social-emotional needs. These services will include tailored curricula that focus on core academic subjects, life skills education, and social-emotional learning opportunities. We will collaborate with local agencies and institutions to ensure that these students receive a coordinated approach to support that includes academic tutoring, mentoring, and counseling services.

The implementation of these programs is closely monitored to assess their effectiveness in improving educational outcomes. Adjustments are made based on ongoing evaluations and feedback from students, parents, and educational staff. By aligning these initiatives with our LCAP goals, Sage Oak ensures that federal funds are used strategically to supplement and enhance our state-funded initiatives, thereby providing a cohesive and integrated educational experience for all students.

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak Charter School, identifying students most in need of services under the targeted assistance school program outlined in Section 1115 is a collaborative and data-driven process, tailored to our independent study model. This approach involves a broad spectrum of the school community to ensure that the support provided is comprehensively tailored to the individual needs of each student.

The identification process begins with an analysis of academic performance data, including standardized test results, progress in coursework, teacher evaluations, and other relevant assessments. We also consider factors such as

engagement levels in learning activities, progress in personalized learning plans, and any social-emotional assessments to ensure a holistic view of each student's needs.

Teachers and school leaders work in consultation with parents, administrators, and specialized instructional support personnel to review and discuss the data collected. This collaborative dialogue is crucial as it helps integrate insights from various perspectives, particularly from parents who provide vital information about their child's learning environment and any external factors influencing their educational experience.

The team prioritizes students based on the urgency and severity of their needs. The criteria for this prioritization include the extent of academic challenges, the potential impact of additional support on the student's educational outcomes, and the capacity of our resources to effectively address these needs.

This collaborative and data-informed approach ensures that the targeted assistance provided is directly responsive to the most pressing needs of our students. By maintaining regular communication and strategic meetings with all stakeholders involved, Sage Oak sustains a dynamic and adaptable support system that enhances educational outcomes and overall student well-being in a non-classroom based setting.

Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we are committed to supporting the educational needs of homeless children and youth through a comprehensive approach that aligns with the McKinney-Vento Homeless Assistance Act. Our strategy ensures that these students have equal access to educational opportunities and are supported in their enrollment, attendance, and academic success.

To address the challenges faced by homeless students, Sage Oak provides specific services designed to remove barriers to their education. This includes ensuring immediate enrollment even when students do not have access to required documents typically necessary for school entry. We provide assistance with obtaining academic and medical records, and we offer school supplies and materials at no cost to the families. We also reserve a portion of our federal funds under Section 1113(c)(3)(A) to support additional services tailored to the needs of homeless students.

In collaboration with services provided under the McKinney-Vento Act, our school appoints a liaison for homeless students to help coordinate these efforts. This liaison works directly with students and families to identify their specific needs and connect them with available resources. They also work with school staff to raise awareness about the challenges faced by homeless students and to train staff on how to best support these students in an educational setting.

Through these coordinated efforts, Sage Oak Charter School strives to create a supportive environment that mitigates the impact of homelessness on students' education, ensuring that all students have the opportunity to succeed and thrive academically.

Student Transitions

ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

n/a

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

- (A) through coordination with institutions of higher education, employers, and other local partners; and
- (B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we recognize the importance of smooth transitions for students moving from middle grades to high school and from high school to postsecondary education. Our strategies are designed to support these critical transitions, ensuring that our students are well-prepared for each new phase of their educational journey.

Key to facilitating the transition from middle grades to high school, Sage Oak ensures our curriculum aligns with the latest academic standards and opportunities. Additionally, we engage with local employers and community partners to provide students with relevant insights into various career paths and the skills required in the workforce, enriching our curriculum with practical applications and real-world relevance.

For students transitioning from high school to postsecondary education or careers, Sage Oak offers robust programs designed to enhance college and career readiness. This includes increased access to early college high school programs, dual or concurrent enrollment opportunities, and comprehensive career counseling services. Our educational advisors play a crucial role in this process, working individually with students to create personalized learning plans that reflect their academic and career goals. These plans are instrumental in navigating course selections, extracurricular activities, and appropriate early college opportunities, tailored to each student's unique interests and skills. Additionally, we are actively increasing our Career and Technical Education (CTE) pathways to include new areas such as Child Development, Sports Medicine, and Arts, Media, and Entertainment (AME), offering students practical and varied career training options that align with their personal interests and market demands. We maintain up-to-date knowledge of University of California (UC) and California State University (CSU) requirements, as well as offerings at community colleges, to guide our students effectively through their educational pathways.

In addition to these transition strategies, our commitment under LCAP Action 1:4 involves developing unified articulation processes that seamlessly transition students through each grade band. This includes integrating critical feedback from graduates and their families to enhance the continuity and relevance of our curriculum, further ensuring our students are prepared for the expectations and challenges of their subsequent educational stages.

Sage Oak's proactive approach ensures that our students are not only aware of their postsecondary options but are also equipped to make informed decisions about their futures. By staying abreast of the latest educational requirements and offerings and implementing these strategies in coordination with higher education institutions, employers, and local partners, we prepare our students to successfully navigate the transitions between educational stages, fully equipped with the knowledge, skills, and qualifications needed to thrive in their chosen paths.

Additional Information Regarding Use of Funds Under this Part

ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

- (A) assist schools in identifying and serving gifted and talented students; and
- (B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

THIS ESSA PROVISION IS ADDRESSED BELOW:

n/a



TITLE I, PART D

Description of Program

ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

THIS ESSA PROVISION IS ADDRESSED BELOW:

Formal Agreements

ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the

(A) LEA; and

(B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Comparable Education Program

ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Successful Transitions

ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Educational Needs

ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children

and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Social, Health, and Other Services

ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Postsecondary and Workforce Partnerships

ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Parent and Family Involvement

ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Program Coordination

ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Probation Officer Coordination

ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Individualized Education Program Awareness

ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Alternative Placements

ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE II, PART A

Professional Growth and Improvement

ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

At Sage Oak, our professional development strategy is crafted to support educators at every stage of their careers, ensuring they are well-prepared to meet the diverse needs of our student body. This strategy begins with induction for new teachers and extends through ongoing development opportunities, including participation in professional development conferences such as those provided by the California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC).

We also broaden our educators' training with specialized sessions such as AVID training to bolster college readiness and the UC conference to align with university standards. Also, our staff partakes in targeted professional development focused on special education, ensuring that they are proficient in the latest methodologies and practices.

Our efforts are further supported by Professional Learning Communities (PLCs) which foster collaborative learning and data-driven decision-making. This collaborative environment allows educators to share insights and strategies, enhancing educational practices. Live instruction training is another critical component of our professional development program, ensuring that our educators are proficient in engaging students effectively in a dynamic and increasingly digital learning environment.

In addition, we provide leadership development opportunities for advancement pathways, ensuring a continuous cycle of professional growth and leadership within our school community.

We continually assess the effectiveness of our professional development programs through regular feedback, allowing us to align our strategies closely with both our educational goals and the evolving needs of the school. This comprehensive approach not only supports the professional growth of our educators but also enhances the overall educational experience for our students, ensuring that every member of our school community is equipped to thrive in an ever-changing educational landscape.

Prioritizing Funding

ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

Address these questions:

1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.

2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

THIS ESSA PROVISION IS ADDRESSED BELOW:

n/a

Data and Ongoing Consultation to Support Continuous Improvement

ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.
3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
 - a. Teachers
 - b. Principals and other school leaders
 - c. Paraprofessionals (including organizations representing such individuals)
 - d. Specialized instructional support personnel
 - e. Charter school leaders (in a local educational agency that has charter schools)
 - f. Parents
 - g. Community partners
 - h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

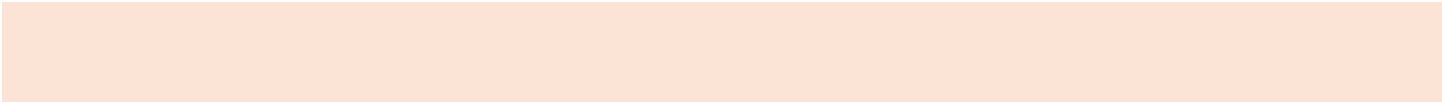
At Sage Oak, our approach to continuous improvement under Title II, Part A, revolves around a robust system of data analysis and ongoing consultation. We integrate Title II activities with our broader educational strategies, ensuring alignment with our holistic educational goals, such as those outlined in our Local Control and Accountability Plan (LCAP).

We employ a data-driven approach to monitor and refine professional development activities. This includes regular analysis of student performance data, staff feedback on professional development sessions, and other relevant metrics. Our Professional Learning Communities (PLCs) play a crucial role here, enabling educators to discuss and implement strategies based on data insights.

Sage Oak conducts evaluations of Title II, Part A activities throughout the academic year. This regular monitoring allows us to stay responsive to the needs of our educators and students, adapting our strategies to maximize effectiveness.

Our consultation process is inclusive, involving a wide range of stakeholders. We engage with teachers, principals, specialized instructional support personnel, and charter school leaders to ensure diverse perspectives are considered. Community partners and organizations with relevant expertise are also involved, enriching our professional development programs.

By systematically integrating feedback and data into our professional development initiatives, Sage Oak Charter School ensures that our educational practices are not only aligned with current needs but are also poised for future success, fulfilling our commitment to continuous improvement.



TITLE III, PART A

Title III Professional Development

ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Enhanced Instructional Opportunities

ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Title III Programs and Activities

ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:

1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
 - are focused on English learners and consistent with the purposes of Title III;
 - enhance the core program; and
 - are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

- (A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
- (B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE IV, PART A

Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

- (A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
- (B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
- (C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
- (D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
- (E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than \$30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

- 1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
- 2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
- 3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
 - a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, our utilization of Title IV, Part A funds is closely aligned with LCAP Goal 3, which focuses on enhancing our technological capabilities to support personalized learning and operational efficiency. We invest in innovative educational technologies, including the development and integration of AI-driven tools. These technologies are designed to tailor learning experiences to individual student needs and streamline administrative processes, thereby enhancing educational outcomes and operational efficacy.

Our objective with these funds is to not only integrate cutting-edge technology into our curriculum but also to ensure these tools effectively support our educational goals. We periodically evaluate the effectiveness of these technological interventions by analyzing student engagement metrics, academic performance data, and operational efficiency indicators. This ongoing assessment helps us refine our technology strategy to ensure it remains aligned with the evolving needs of our students and the broader educational landscape, maintaining our commitment to providing a high-quality, future-ready education.

Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least \$30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for a well-rounded education?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for safety and health of students?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at <https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp>.

Date of LEA's last conducted needs assessment:

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: <https://www.cde.ca.gov/sp/st/>

California Department of Education
February 2022



LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- Keppel

CDS Code: 19-64642-0136127

School Year: 2025-26

LEA contact information:

Krista Woodgrift

Superintendent

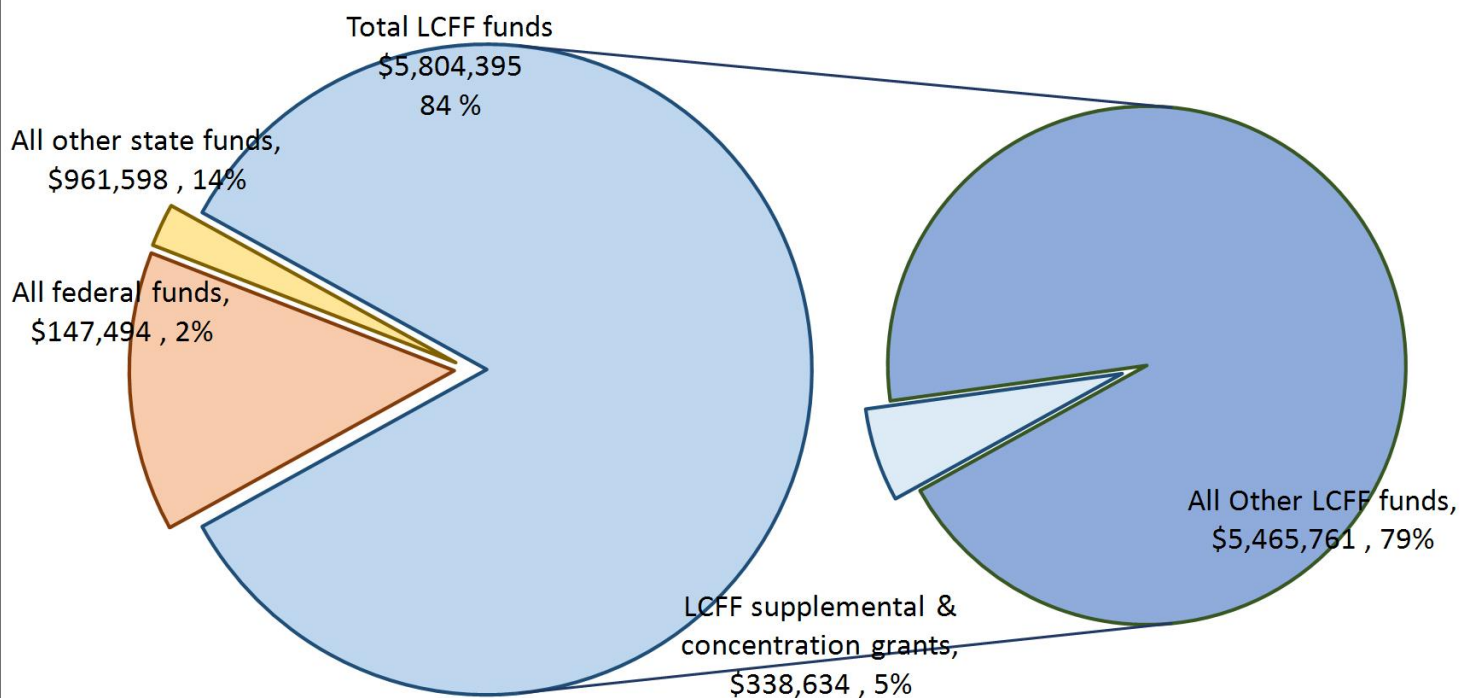
kwoodgrift@sageoak.education

888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2025-26 School Year

Projected Revenue by Fund Source

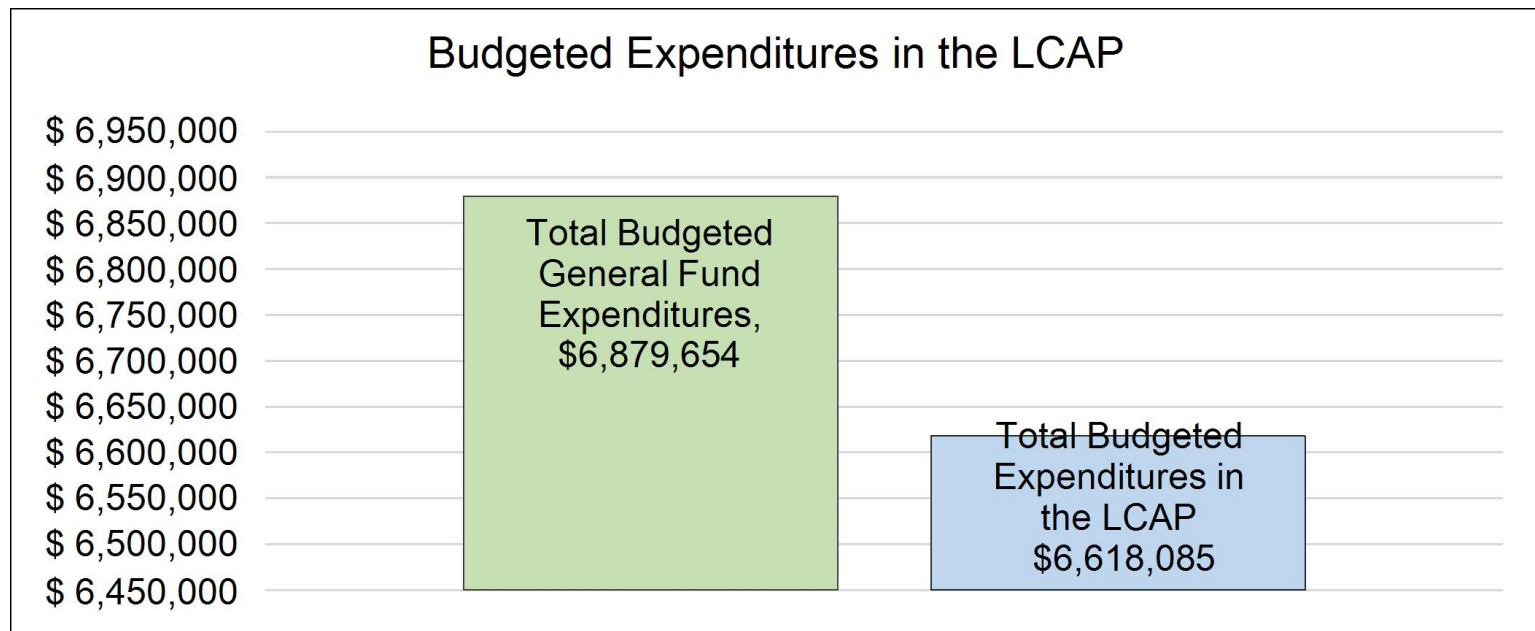


This chart shows the total general purpose revenue Sage Oak Charter School- Keppel expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School-Keppel is \$6,913,487, of which \$5,804,395 is Local Control Funding Formula (LCFF), \$961,598 is other state funds, \$0 is local funds, and \$147,494 is federal funds. Of the \$5,804,395 in LCFF Funds, \$338,634 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- Keppel plans to spend for 2025-26. It shows how much of the total is tied to planned actions and services in the LCAP.

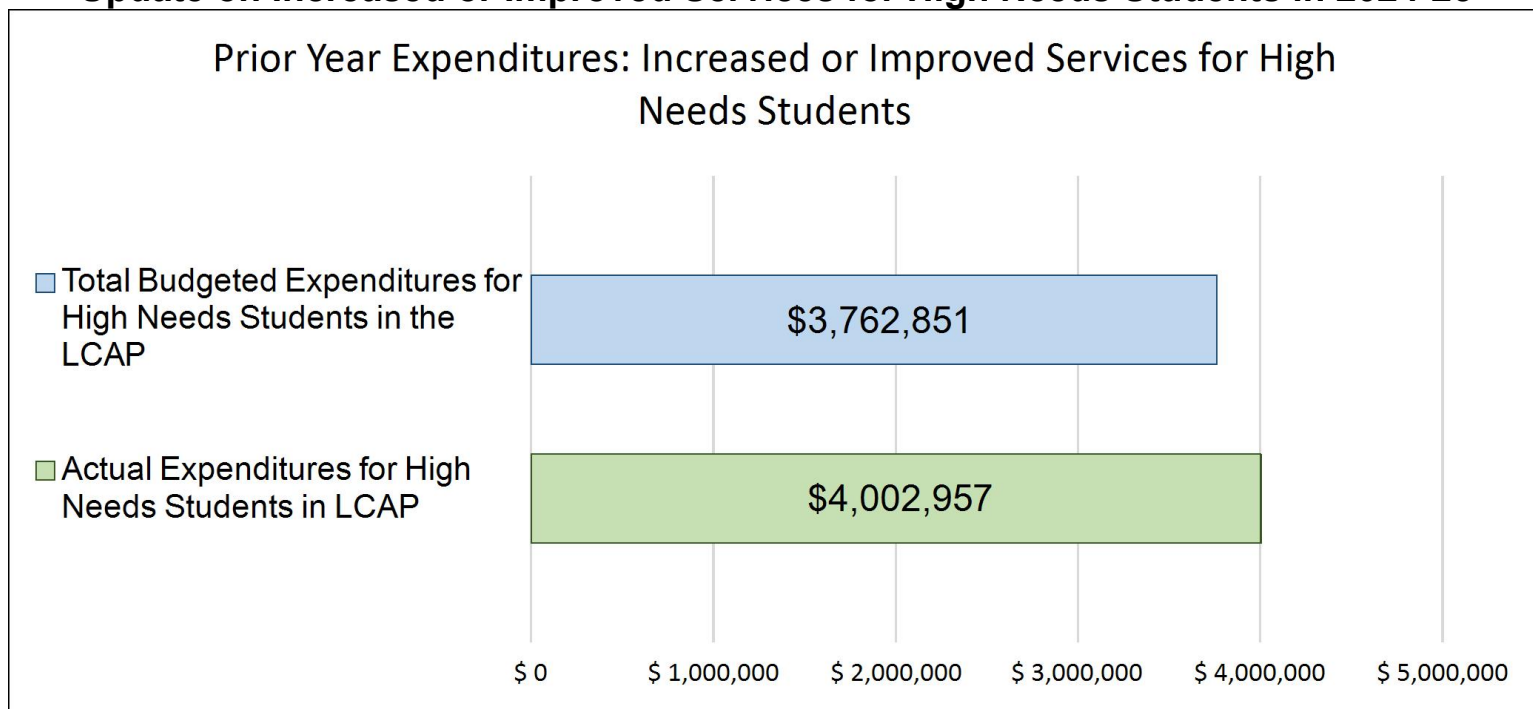
The text description of the above chart is as follows: Sage Oak Charter School- Keppel plans to spend \$6,879,654 for the 2025-26 school year. Of that amount, \$6,618,085 is tied to actions/services in the LCAP and \$261,569 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Increased or Improved Services for High Needs Students in the LCAP for the 2025-26 School Year

In 2025-26, Sage Oak Charter School- Keppel is projecting it will receive \$338,634 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- Keppel must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- Keppel plans to spend \$4,785,098 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2024-25



This chart compares what Sage Oak Charter School- Keppel budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- Keppel estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2024-25, Sage Oak Charter School- Keppel's LCAP budgeted \$3,762,851 for planned actions to increase or improve services for high needs students. Sage Oak Charter School- Keppel actually spent \$4,002,957 for actions to increase or improve services for high needs students in 2024-25.

The difference between the budgeted and actual expenditures of \$240,106 had the following impact on Sage Oak Charter School- Keppel's ability to increase or improve services for high needs students:



Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sage Oak Charter School- Keppel	Krista Woodgrift Superintendent	888-435-4445 888-435-4445

Plan Summary [2025-26]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Sage Oak Charter School - Keppel educates students through a personalized and collaborative learning approach, offering students from transitional kindergarten through 12th grade an empowering education designed to prepare them for purposeful and productive lives. At Sage Oak, we cherish the individuality of each student, inspiring them to leverage their unique potential and contribute positively to their communities. Our commitment to our students is encapsulated in our core values: Service, Accountability, Growth Mindset, and Excellence, which guide our educational approach and community interactions.

Operating across a diverse geographical region that includes Los Angeles, Ventura, Orange, Kern, and San Bernardino counties, Sage Oak offers a unique balance of flexibility, accountability, and academic excellence. Our educational model emphasizes the importance of partnership between educators and families, ensuring that each student's personal academic goals are achieved through a tailored educational experience.

Sage Oak is dedicated to harnessing the power of flexible learning environments and advanced educational technologies to cater to a wide range of learners. Our approach is characterized by personalized learning pathways that accommodate students' diverse backgrounds and aspirations, providing them with a stimulating and supportive alternative to traditional education models. Through the integration of a varied curriculum, individualized support, and high academic standards, Sage Oak fosters an environment where students are encouraged to become self-motivated, competent, lifelong learners poised to make a meaningful impact in their communities.

Our educational philosophy prioritizes the development of open, curious, and alert minds, preparing students to thrive in any learning situation. By offering the flexibility to learn anytime and anywhere, combined with adaptable teaching and curricular models, Sage Oak empowers students to take ownership of their education. This approach equips them with not only the necessary knowledge and skills but also the confidence, creativity, and resourcefulness to navigate the challenges and opportunities of the 21st century.

As of the most recent data reporting period, Sage Oak serves a vibrant and diverse student body, with enrollment reflecting a broad spectrum of cultural and socio-economic backgrounds. Our commitment to inclusivity and excellence is evident in our dedicated staff, innovative programs, and the supportive community that makes Sage Oak a leader in personalized education.

Based on the Fall 1 Census data reporting on October 1, 2025, to be reported on the California Dashboard, there were 441 students enrolled. Of these enrollments, 77 were identified as Title I students. Other student groups are as follows: 48.98% are classified as Socioeconomically Disadvantaged (SED). Students with Disabilities (SWD) make up 10.88% of the population, and English Learners (EL) make up 1.81%. The ethnic diversity of Sage Oak includes students who are White (32.7%), Hispanic (49.9%), Two or More Races (5.7%), Asian (5.2%), African American (4.3%), Filipino (1.8%), American Indian/Alaskan Native (.2%), and Native Hawaiian/Other Pacific Islander (.2%).

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflecting on Sage Oak's annual performance via the California School Dashboard and local data reveals both triumphs and areas for growth. Our achievements are underscored by high graduation rates and college and career readiness, along with very low rates in chronic absenteeism, suspension, and expulsion, indicating a supportive and engaged school environment. We perform above the state in all indicators, highlighting our strong academic program. In addition, the performance in English Language Arts (ELA) is notably high, placing us in the high category and showcasing our strong ELA program. However, challenges persist in academic performance for Students with Disabilities, with Math for SWD highlighted as a focus area. Recognizing the lack of sufficient data for English Learners (EL), Homeless, and Foster student groups due to their small numbers, our focus will also encompass enhancing the overall academic foundation and addressing the gaps identified.

California School Dashboard Analysis

ELA Distance from Standard (DFS):

Overall : +11.8 (High)

EL: n/a- not enough students

SWD: -81.4 (Low)

SED: -19.6 (Low)

Math DFS:

Overall: -13.2 (Medium)
EL: n/a- not enough students
SWD: -102.7 (Very Low)
SED: -52.4 (Low)

Chronic Absenteeism: 0.% (Very Low)

Grad Rate: 92.3% (Very High)

Suspension: 0% (Very Low)

Expulsion: 0% (Very Low)

College and Career Readiness: 76.9% (Medium)

EL Progress (ELPI): n/a- not enough students

iReady Local Assessment Analysis

ELA (on or above grade level):

Overall : 68%

EL: n/a- too small group

SWD: 36%

SED: 59%

Homeless:n/a- too small group

Foster:n/a- too small group

Math (on or above grade level):

Overall: 58%

EL: n/a- too small group

SWD: 31%

SED: 46%

Homeless: n/a- too small group

Foster: n/a- too small group

Our strategic response, aligned with our LCAP goals, not only focuses on targeted interventions, the expansion of professional development opportunities, and the integration of advanced technologies and personalized learning pathways but also emphasizes enhancing college and career readiness pathways. This holistic approach is designed to elevate educational outcomes, ensuring all students, particularly those needing extra support, achieve their fullest potential and are well-prepared for their future careers and academic endeavors.

Learning Recovery and Emergency Block Grant (LREBG)

Sage Oak has unexpended LREBG funds for the 2025-26 school year. LREBG funded actions may be found in Goal 1, Action 2 and Goal 2, Action 4. A review of state and local data, and engagement feedback indicates a need to support our intervention and counseling programs for qualifying students, ensuring small teacher to student ratios and addressing the needs to engage students of all student groups. Sage Oak has strategically invested in expanding staff supports using the LREBG. This action aligns to allowable uses of funds in the area of staff hiring and development to elevate our intervention programs and resources to all students in both English Language Arts and Mathematics small group instruction. See action descriptions for more.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

n/a

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

n/a

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

n/a

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

n/a

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parent Advisory Committee	The Parent Advisory Committee played a pivotal role in shaping the Local Control and Accountability Plan (LCAP), engaging in key meetings on 9/5/24, 10/3/24, 12/5/24, 1/10/25, 3/6/25, 5/1/25.. Additionally, the Parent Advisory Committee also met with our Board on 3/4/25, sharing their contributions and increasing their valuable influence. They provided valuable insights, focusing on enhancing curriculum options and advocating for educational approaches tailored to diverse student needs. Key areas of emphasis included promoting experiential learning, fostering strong teacher-student relationships, and integrating physical and social activities for comprehensive student development. The committee also highlighted the importance of engaging non-English speaking families and utilizing AI and technology to complement traditional teaching methods. Their contributions were instrumental in formulating strategies that support college and career readiness, reinforce the Multi-Tiered System of Supports (MTSS), and advocate for continuous teacher and staff development
Student Advisory Committee	The Student Advisory Committee was a newly formed committee this year. The student-led committee met four times this school year. They met on 9/6/24, 12/5/24, 1/10/25, and 5/2/25. They played a unique role in contributing to the Local Control and Accountability Plan emphasizing student voice and improving student input on feedback campaigns. They contributed to staff professional learning communities and had a key role in the Spring when connecting with teachers in ways to share input and influence future decisions.

Educational Partner(s)	Process for Engagement
Parents, Students, Teachers, Staff	In the development of the Local Control and Accountability Plan (LCAP), a comprehensive approach was employed to engage parents, staff, and students, ensuring their voices were integral to the plan. This inclusive process utilized various survey platforms, such as Parsec Reals survey platform, to gather in-depth feedback including an AI-led interview regarding parent input. "Question of the Month" surveys were instrumental in capturing ongoing input, while educational partner surveys provided broader insights into the needs and perspectives of the school community. Additionally, climate surveys were conducted to understand the overall environment and satisfaction levels within the educational setting. This multifaceted engagement strategy ensured a diverse range of feedback, which was crucial in shaping a well-rounded and effective LCAP.
Principals, Leadership, Administrators	In shaping the Local Control and Accountability Plan (LCAP), principals, the leadership team, and administrators were essential participants, engaging in strategic initiatives to ensure comprehensive development. Through regular "Question of the Month" surveys, invaluable staff feedback was gathered, providing crucial insights for informed planning. During pivotal meetings on 7/31/24, 8/28/24, 9/18/24, 10/9/24, 1/22/25, 3/5/25, and 4/16/25 the leadership team conducted both half-day and full-day sessions focused on a detailed examination of the school's specific needs, thorough analysis of student achievement data, evaluation of feedback from educational partners, developing and analyzing the annual strategic plan as it impacts the LCAP, and an in-depth assessment of LCFF priorities. These sessions were critical in aligning the LCAP with the school's broader objectives, ensuring the plan is both responsive and robust in addressing the diverse needs of the student body. This methodical and collaborative approach guaranteed a well-structured and effective LCAP, poised to enhance every student's educational experience.
Title 1 Parents/Guardians	In the development of the Local Control and Accountability Plan (LCAP), Sage Oak Charter Schools prioritized meaningful engagement with Title I parents and guardians through a multi-faceted approach grounded in its Parent and Family Engagement Policy. One key initiative included the annual Title I Parent/Guardian Information Meetings, held virtually to ensure accessibility. These meetings provided a platform for two-way communication, enabling

Educational Partner(s)	Process for Engagement
	<p>families to gain important insights into the Title I programs and offer valuable feedback on school strategies and student needs. Sage Oak offers a flexible range of engagement opportunities—including recorded sessions, parent/guardian webinars, and a school-parent compact that seeks feedback from families—which collectively foster an inclusive and supportive school culture. Through consistent communication, such as personalized emails, the weekly Sage News, and outreach to families of Title I students, Sage Oak ensures parents stay informed and empowered to contribute to their child's educational journey. These strategies reflect Sage Oak's commitment to building strong partnerships with families, affirming that their voices are not only heard but are instrumental in shaping educational priorities, enhancing academic outcomes, and fostering student success.</p>
Community Partners	<p>In the development of the Local Control and Accountability Plan (LCAP), the school's partnership with Parsec Education marked a significant enhancement in strategic planning and program evaluation. Parsec Education's expertise was particularly instrumental in developing 'Street Data Metrics,' a set of advanced, nuanced measures designed to provide a deeper understanding of educational impact and student outcomes. This collaboration represents a commitment to incorporating expert external insights and data-driven methodologies into the LCAP. The involvement of Parsec Education not only introduced innovative perspectives to the planning process but also ensured that the evaluation of programs was thorough and reflective of real-world educational scenarios. This partnership, especially in the development of these tailored 'Street Data Metrics,' underscores the school's dedication to employing comprehensive, expert-driven strategies to achieve its educational goals and enhance the overall learning experience.</p>

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The adopted Local Control and Accountability Plan (LCAP) for Sage Oak Charter School is a direct reflection of the school's robust commitment to inclusive, data-informed decision-making and deep educational partner engagement. Sage Oak's approach is grounded in its Parent and Family Engagement Policy, which outlines a comprehensive framework for involving Title I families and the broader school community in shaping school priorities. Through a blend of community partner surveys, parent/guardian webinars, and advisory councils

such as the Parent Advisory Committee (PAC), and Student Advisory Committee (STAC), Sage Oak ensures that all voices—especially those of high-needs student groups—inform the development and refinement of school policies and practices.

This year's LCAP development process was notably shaped by consistent input, reflecting the charter network's commitment to equity, even amidst differing student populations and geographic locations. The PAC and STAC emphasized the importance of improved onboarding for new students, particularly English Language Learners, to help them adapt to the school's independent learning model. They also advocated for enhanced math instruction through engaging formats, increased tutoring options, and more age-appropriate survey tools.

Consistent with Sage Oak's policy, an annual evaluation of parent engagement practices and barriers to participation is conducted, with findings used to update and improve programs. This evidence-based cycle allows for the alignment of initiatives such as college and career readiness, the Multi-Tiered System of Supports (MTSS), and continuous professional development for staff—especially in live, synchronous instruction. Surveys collected through the Parsec Reals platform revealed high satisfaction with Sage Oak's learning environment, safety, and student achievement—often exceeding state benchmarks—while also identifying key areas for growth. Broad staff participation in the LCAP surveys support deep strategic alignment and instructional and leadership development are supported by reflective practices across teams. These Reals assist in building leadership capacity and improving satisfaction. Parent, student, and staff engagement is a clear strength for Sage Oak revealing meaningful engagement across events, academic programs, and formats, including asynchronous and synchronous learning. Student and family voices inform decisions around programming, engagement, and assessment experience. Advisory councils recommended promoting feedback campaigns more proactively and introducing parent chat groups for real-time collaboration. Ultimately, Sage Oak's LCAP reflects a collaborative, transparent, and evolving strategy designed to meet the diverse needs of its learners. Through intentional and recurring engagement with families and staff, Sage Oak continues to position itself as a leader in personalized, inclusive education—preparing all students, especially those with the greatest needs, to thrive academically and personally.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	<p>Student Outcomes: Academic Achievement and College and Career Readiness</p> <p>To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.</p>	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

At the heart of this goal lies a commitment to holistic education. Through its standout programs, Sage Oak not only offers an excellent academic foundation but also fosters a love for learning and a commitment to serving the community. These programs are designed to be immersive, innovative, and integrated, ensuring that every student gets a chance to shine and find their passion. Whether it's through advanced academic curricula, extracurricular activities, or real-world application projects, the objective is clear: to produce graduates who are not only academically adept but also critical thinkers, problem solvers, and community leaders.

At Sage Oak, our commitment to data-informed practices drives our focus on tangible academic achievements and readiness. Currently, 69% of our high school students have completed A-G requirements. With that and only a small number of students completing CTE pathways, our strategies include enhancing college and career readiness support through high school counselors and the development of additional CTE pathways. Sage Oak also specifically tailors its educational approach to support socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. For our socio-economically disadvantaged students and students with disabilities, CAASPP scores and iReady growth show a need for improvement. In addition, since 51% of students with disabilities are 2 or more grade levels below in iReady Math, our efforts are geared towards ensuring all students reach their fullest potential. With the further

development of our AVID program and increasing participation in synchronous instruction, professional development opportunities, and a specific focus on supporting our LTELs and students qualifying for intervention, we aim to lift these scores. By embedding education within immersive, innovative, and integrated programs and utilizing Learning Recovery Emergency Block Grant (LREBG) funds with increased staffing, this goal directly supports all students, enhancing their academic proficiency, critical thinking, college and career readiness, and leadership skills. This inclusive strategy demonstrates Sage Oak's commitment to equitable, high-quality educational opportunities, ensuring all students have the resources and support needed to succeed.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	Completion of A-G Requirements: % of students successfully completing the A-G requirements	54.5% Source: Dataquest 22-23	69.2%		59.5%	14.7%
1.2	Career Technical Education (CTE) Pathway Completion # of students completing CTE pathways	1 student Source: Dataquest 22-23	0 students		7 students	-1
1.3	Percentage of Students Achieving a Score of 3 or Higher on AP Exams	n/a- too few students Source: College Board 22-23	0		70%	0
1.4	College and Career Indicator (CCI) Performance	54.5% Source: CA Dashboard 22-23	76.9%		60%	22.4%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of students considered college and career prepared according to the CA Dashboard					
1.5	Graduation Rate Maintenance % of graduated students on the CA Dashboard	100% Source: CA Dashboard 22-23	92.3%		90%	-7.7%
1.6	Maintenance of Low Middle School Dropout Rates # of middle school dropouts	.98% Source: Internal 22-23	.94%		0	-.4%
1.7	Maintenance of Low High School Dropout Rates % of high school dropouts according to DataQuest cohorts	0% Source: CA Dataquest 22-23	0%		2% or less	0
1.8	Expansion of K-8 Live Synchronous Instruction Courses Aligned with CTE Pathways	79 course offerings Source: Internal 22-23	198		200 course offerings	119

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	# of K-8 synchronous course offerings that align with the CTE pathways					
1.9	Performance in iReady Assessments for ELA and Math % of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics	Math- 58% ELA- 68% Source: i-Ready 23-24 Spring	Math- 59% ELA- 69%		Math- 61% ELA- 71%	Math- 1% ELA- 1%
1.10	California Assessment of Student Performance and Progress (CAASPP) Achievement: % of students who have met or exceeded standards in CAASPP assessments for English Language Arts (ELA) and Mathematics	Math- 48.33% ELA- 65.07% Source: Dataquest 22-23	Math 44.39% ELA 56.63%		Math- 51% ELA- 68%	Math -3.94% ELA -8.44%
1.11	CAASPP Performance for Socio-Economically Disadvantaged (SED) Students	Math- 34.88% ELA- 52% Source: Dataquest 22-23	Math 29.54% ELA 42.05%		Math- 37% ELA- 55%	Math -5.34% ELA -9.95%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of socio-economically disadvantaged students meeting or exceeding CAASPP standards in English Language Arts (ELA) and Mathematics					
1.12	<p>Accessibility to Instructional Materials</p> <p>% of students with full access to necessary instructional materials</p>	<p>100%</p> <p>Source: SARC 23-24</p>	100%		100%	0
1.13	<p>Alignment with State Standards</p> <p>% of students whose education is fully aligned with state standards</p>	<p>100%</p> <p>Source: SARC 23-24</p>	100%		100%	0
1.14	<p>Community Belief in Robust Curriculum</p> <p>% of parents, students, and staff who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level</p>	<p>Parents- 98%</p> <p>Students- 97%</p> <p>Staff- 99%</p> <p>Source: Internal 23-24</p>	<p>Parents 98%</p> <p>Students 96%</p> <p>Staff 94%</p>		<p>Parents- 90% or higher</p> <p>Students- 90% or higher</p> <p>Staff- 90% or higher</p>	<p>Parents 0</p> <p>Students -1%</p> <p>Staff -5%</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	standards in core content areas.					
1.15	<p>Growth in ELA and Math Among Intervention Students</p> <p>% of students receiving interventions who demonstrate growth equivalent to one year or more in English Language Arts (ELA) and Mathematics</p>	<p>Math- 51%</p> <p>ELA- 57%</p> <p>Source: Internal 22-23</p>	<p>Math 47%</p> <p>ELA 35%</p>		<p>Math- 43%</p> <p>ELA- 51%</p>	<p>Math -4%</p> <p>ELA -22%</p>
1.16	<p>Increased Participation Rate in Math Interventions for Students with Disabilities (SWD)</p> <p># of SWD participating in math intervention programs</p>	<p>60%</p> <p>Source: Internal 23-24</p>	61%		60%	1%
1.17	<p>Increased iReady Math Achievement for Students with Disabilities (SWD)</p> <p>Decrease % of SWD moving out of Tier 3 in iReady math assessments</p>	<p>36%</p> <p>Source: i-Ready 22-23</p>	51%		33%	15%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.18	Improved CAASPP Performance for SWD in Math Achievement Increase in DFS in Math for SWD 3 points annually	-77.5 DFS Source: CA Dashboard 22-23	-102.7 DFS		-68 DFS	-25.2
1.19	Increased Teacher Preparedness for Student Articulation % of teachers who feel equipped to effectively prepare and transition their students to the next grade level band	78% Source: Internal 23-24	98%		90% or higher	20%

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Academic Achievement and College & Career Readiness

Sage Oak Charter School made meaningful progress in the implementation of Goal 1 initiatives, aimed at improving academic performance and expanding access to college and career readiness (CCR) pathways. Grounded in the strategic plan, the year's implementation focused on personalized instruction, increased course access, and targeted support for high-need student groups including English Learners (ELs), Long-Term English Learners (LTELs), Students with Disabilities (SWD), and Socioeconomically Disadvantaged (SED) students.

Planned vs. Actual Implementation:

Planned actions included the expansion of Career and Technical Education (CTE) pathways, AVID 9/10 integration, A-G counseling supports, increased synchronous instruction, and improved tiered interventions. While many of these initiatives were implemented as intended, a few require strategic adjustments or are still in development.

For example, the AVID 9/10 elective was successfully piloted and fully implemented this year. Additionally, Sage Oak's Oakschool program—a name used for its live, synchronous course offerings—received positive feedback from students. Oakschool provides a wide range of real-time, teacher-led classes in both core subjects and enrichment areas for students in grades TK–12. Notably, the number of CTE-aligned Oakschool offerings grew significantly, increasing from 79 to 198 courses by the end of the year. This expansion places the school on track to meet its goal of 200 synchronous courses by 2026.

In terms of A-G completion, Sage Oak Keppel saw notable growth, increasing from 54.5% to 69.2%. These improvements reflect strengthened academic counseling and intentional alignment of coursework with university entrance requirements.

At Sage Oak Keppel, one student attempted an AP exam in 2023–24 but did not pass, resulting in a 0% pass rate for the year. This marks only the second instance of AP participation at Keppel in recent years, reflecting the site's historically small testing cohort and limited AP enrollment. While it is encouraging to see continued interest in advanced coursework, the outcome underscores the need for more structured support, including targeted preparation, instructional alignment, and increased awareness of AP opportunities. As the site works to expand access to rigorous academic pathways, efforts to grow participation and improve readiness—particularly through in-house testing options and strengthened academic counseling—will be critical to future success.

In the area of CTE pathway completion, data showed low overall completion numbers. However, this metric does not fully capture the school's CTE engagement and progress and enrollments continue to increase in our current five pathways.. Each new pathway (e.g., Entrepreneurship, Computer Science, Sports Medicine) is piloted for one year to assess student interest before full implementation. Because these are multi-year programs, students who transfer or graduate early are recorded as non-completers—even when they pursue the same career field elsewhere.

To address this, Sage Oak has begun developing fully built-out internal CTE pathways, including in-house capstone projects that enable students to complete the entire sequence without relying on external options. In 2024–25, Sage Oak also piloted a Computer Science internship, and plans to expand next year with the addition of a Child Development internship in the VLA TK class. These steps reflect a deepening commitment to hands-on, career-connected learning that is accessible and sustainable within Sage Oak's instructional model. On the academic achievement side, iReady diagnostic data showed continued academic needs among Socioeconomically Disadvantaged (SED) students and Students with Disabilities (SWD), particularly in math. Although the school implemented targeted intervention support—funded through the Learning Recovery Emergency Block Grant (LREBG)—and assigned dedicated staff to provide Tier 2 and Tier 3 instruction, the percentage of intervention students demonstrating at least one year of academic growth in ELA and math did not increase. Intervention teachers delivered small group, data-aligned instruction and collaborated with general education staff on progress monitoring and instructional adjustments. However, a key factor influencing these results was a shift in enrollment and student retention patterns at Keppel. As a result, while support systems were strengthened, measurable growth was impacted, highlighting the need for ongoing instructional responsiveness and enhanced onboarding strategies for new students. School-wide, Keppel did show relatively strong ELA achievement, with iReady scores improving from 68% to 69% of students performing at or above grade level, and math performance increasing by 1% to 59% compared to our baseline year.

Successes:

Personalized and Synchronous Instruction Expansion:

Sage Oak grew from 79 to 198 synchronous CTE-aligned offerings, diversifying learning pathways and increasing access to high-interest content across K–8.

College & Career Indicator (CCI) Gains:

CCI rates improved, at Keppel from 54.5% to 76.9%, supported by expanded course access, academic counseling, and pathway clarity.

A-G Completion Growth:

Significant gains in A-G completion demonstrate success in improving academic planning and access to college-prep coursework. Stakeholder feedback from surveys and advisory groups reflected high levels of satisfaction with access to challenging curriculum, college and career readiness, diverse course offerings, and personalized academic support. Parents, students, and staff also expressed confidence in the support provided for English learners, noting that a range of targeted resources has positively influenced their academic achievement. In addition, Sage Oak teachers reported high satisfaction with professional development specifically designed to help them prepare students for the expectations and standards of the next grade level, reinforcing the school's commitment to instructional alignment and continuous improvement.

Challenges:

Persistent Achievement Gaps:

Despite targeted efforts, achievement gaps persist at Sage Oak Keppel, particularly among Students with Disabilities (SWD) and Socioeconomically Disadvantaged (SED) students. While the participation rate in math interventions for SWD increased slightly from 60% to 61%, the proportion of SWD students scoring in Tier 3 on the iReady Math diagnostic actually rose from 36% to 51%, indicating that many students remain two or more years below grade level. On the CAASPP, the Distance from Standard (DFS) for SWD in Math dropped significantly—from -77.5 to -102.7, highlighting a growing gap in performance. Similarly, CAASPP math scores for SED students declined from 52% meeting/exceeding standards to 42%. These results underscore the need for continued refinement of intervention strategies, more targeted instructional support, and ongoing professional development to address the complex needs of these student groups.

CTE Pathway Completion Tracking:

While participation is growing, multi-year structure, student transfers, and absence of internal capstones contributed to low recorded completion rates. Continued investment in internal pathway design and internship partnerships is a priority.

AP Participation Barriers:

The absence of a centralized testing site has created access challenges, impacting both participation and performance. This improvement for year 2 is expected to provide a more supportive testing environment and boost future participation and performance.

Conclusion and Next Steps:

Sage Oak demonstrated strong intent and partial success in implementing Goal 1. Gains in CCI, A-G completion, synchronous learning, and intervention support were offset by slower growth in CTE completions, achievement gaps, and AP outcomes. As the school enters Year 2 of the LCAP cycle, action plans are being refined to:

- Expand internal CTE capstone options and internships;
- Become an official AP testing site;
- Increase professional development for EL and math instruction;
- Intensify Tiered supports for students with the greatest need.

Ongoing community input, use of real-time data, and strategic design will ensure implementation evolves to meet the needs of all learners—preparing every student for college, career, and life success.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 1.3 related to increased expenditures for math materials

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The actions undertaken to support Goal 1 have yielded a range of outcomes, with areas of clear growth alongside others requiring further strategic attention. The overall focus on enhancing personalized learning, college and career readiness (CCR), and equitable academic support, especially for historically underserved student groups, has set a strong foundation. However, key metrics indicate the need to adjust and intensify implementation in certain areas, including students with Disabilities (SWD), and students pursuing AP exams and CTE pathways.

College and Career Readiness – Moderately Effective

The school made measurable progress in increasing College and Career Indicator (CCI) performance. Rates rose to 76.9% as a result of expanded course offerings, synchronous instruction, and improved counseling supports. Yet, despite these gains, CTE pathway completion remains low, and A-G completion growth has been incremental. The slower pace of growth is largely attributed to student preference for non-A-G options and delayed implementation of internal capstone courses in CTE programs?.

Career Technical Education (CTE) Pathway Completion – Emerging Effectiveness with Accessibility Gains

The CTE pathway completion metric is designed to reflect not only student vocational success but also engagement with career-readiness programming. Historically, Sage Oak's CTE pathway completion numbers have appeared low. However, this does not fully represent the program's progress or student participation. While traditional completion rates remain modest due to technical and structural factors, student engagement is growing, and expanded access strategies—like internal capstones and internships—are expected to significantly increase future completions and readiness.

AVID and Synchronous Instruction Expansion – Highly Effective

The rollout of the AVID 9/10 elective and a significant increase in synchronous courses (from 79 to 198 offerings) have greatly expanded access to rigorous and career-connected instruction. These initiatives have been well-received by students and families and directly support both academic achievement and career readiness. The school is on track to meet its three-year goal of 200 synchronous offerings aligned to CTE pathways?.

AP Exam Participation and Performance – Intermittent Effectiveness, Building for Growth

Sage Oak Keppel's AP participation has been infrequent but emerging over the past several years. In 2023–24, one student attempted an AP exam but did not pass, resulting in a 0% pass rate. While the small number of test-takers reflects Keppel's limited cohort size and AP access, it also highlights a growth opportunity. As Keppel expands its college and career readiness programming, the school is prioritizing strategies to support consistent AP enrollment, improve preparation, and build sustainable success through internal supports and eventual access to in-house testing. Becoming an official AP testing site will be a key step in removing barriers and fostering greater student participation in the future.

Math and ELA Achievement – Varied Effectiveness by Subgroup

Sage Oak Keppel shows relatively strong ELA achievement, with iReady scores improving from 68% to 69% of students performing at or above grade level, and math performance maintaining at 59%. However, significant concerns remain in math achievement for Students with Disabilities (SWD) and Socioeconomically Disadvantaged (SED) students. The SWD CAASPP Math Distance from Standard (DFS) declined sharply from -77.5 to -102.7, and Tier 3 iReady Math placement for SWD increased from 36% to 51%, signaling an urgent need for more targeted and intensive instructional strategies. Additionally, the percentage of intervention students showing one year of academic growth dropped from 57% to 35%, raising questions about the sustained impact of existing supports. Despite these challenges, Keppel's student retention rate improved significantly—from 59% to 73%—which is expected to enhance consistency in intervention delivery and student progress over time.

Articulation and Data Use – Strengthening with Significant Progress

Sage Oak has made notable progress in implementing a unified, data-informed articulation process between grade spans, aimed at improving instructional continuity and supporting student transitions. A key indicator of this growth is the increase in teacher-reported confidence, rising from 78% to 98%, in their ability to articulate learning expectations and support students across grade levels. This shift reflects the successful rollout of professional development around MasteryConnect and Power Standards, as well as a growing culture of data-driven collaboration. While continued refinement and system-wide consistency are still in progress, this marked improvement in teacher readiness signals that Sage Oak is moving from foundational development to sustained implementation.

Summary of Effectiveness

Effective Actions: Synchronous CTE course expansion, AVID implementation, improvements in overall CCI performance, professional development, and student access to resources

Partially Effective Actions: A-G pathway counseling, math interventions.

Currently Ineffective Actions: AP exam preparation at SOCS, CTE pathway completions, academic outcomes for SWD and EL students.

Continued use of formative data, targeted professional development, and engagement with educational partners are essential to improving outcomes across all student groups in the remaining years of this LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

LREBG update

Additionally, Action 2 has been refocused to reflect the inclusion of Learning Recovery Emergency Block Grant (LREBG) funding. Metric 1.15 now incorporates the strategic use of these funds to expand staffing and strengthen academic interventions for students requiring additional support. This enhancement allows Sage Oak to respond to the increasing number of students in need of targeted instruction. The goal is to help students access and master grade-level standards, leading to improved performance on both local assessments (such as i-Ready) and statewide assessments (such as CAASPP). Emphasis remains on fostering measurable academic growth year over year, with a particular focus on our intervention population.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Integration of Career, Community, and Life Skills	<p>Integrate career, community, and life skills into comprehensive K-12 pathways.</p> <p>This action is dedicated to integrating career, community, and life skills within comprehensive K-12 pathways. It focuses on equipping students with the essential capabilities needed to navigate their future careers and community life successfully. By weaving these skills into the curriculum, we aim to ensure students are academically prepared and possess the practical skills required for the modern workforce and societal participation. This initiative prioritizes equitable opportunities for all students, emphasizing support for unduplicated students, to lay the groundwork for successful transitions to higher education and careers.</p> <p>Metrics for Effectiveness:</p> <p>1.1 Completion of A-G Requirements: The total number of students successfully completing the A-G requirements, indicating readiness for university admission.</p> <p>1.2 Career Technical Education (CTE) Pathway Completion: The quantity of students completing CTE pathways, reflecting vocational engagement and preparedness.</p> <p>1.3 Percentage of Students Achieving a Score of 3 or Higher on AP Exams: The proportion of students who attempt and succeed in Advanced Placement exams, demonstrating college-level academic proficiency. Percentage is reflective of participation as well as passing.</p> <p>1.4 College and Career Indicator (CCI) Performance: Evaluation of students' readiness for post-secondary opportunities through the College and Career Indicator, assessing comprehensive preparedness for college and careers.</p> <p>1.5 Graduation Rate Improvement: An increase in graduation rates, signifying the effectiveness of educational pathways in guiding students to complete their education.</p>	\$5,068,700.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>1.6 Maintain Low Middle School Dropout Rates: A maintenance of low dropout rates at the middle school level, identifying early intervention points to maintain student engagement.</p> <p>1.7 Maintain Low High School Dropout Rates: A maintenance of low dropout rates at the high school level, crucial for assessing the pathways' role in sustaining student engagement through graduation.</p> <p>1.8 Expansion of Live Synchronous Instruction Courses Aligned with CTE Pathways: The expansion of live synchronous instruction courses that directly support CTE pathways, measuring the integration of career-oriented education within the academic curriculum.</p> <p>This action is crafted to not only achieve academic benchmarks but also to cultivate a comprehensive educational experience that thoroughly prepares students for both college and career trajectories.</p>		
1.2	Refinement of Multi-Tiered System of Support	<p>Refine a personalized, data-informed multi-tiered system of support. The focus of the services is on students from unduplicated and identified populations.</p> <p>This action aims to refine a personalized, data-informed multi-tiered system of support (MTSS) that caters to the unique needs of each student. By leveraging comprehensive data analysis and targeted interventions, we will enhance academic achievement and support emotional and social development. This approach is designed to ensure all students, especially those facing socio-economic challenges, receive the necessary support to excel academically.</p> <p>Metrics for Effectiveness:</p> <p>1.9 Performance in iReady Assessments for ELA and Math: Proportion of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics, indicating proficiency and readiness.</p> <p>1.10 California Assessment of Student Performance and Progress (CAASPP) Achievement: Percentage of students who have met or</p>	\$467,563.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>exceeded standards in CAASPP assessments for Math and ELA, reflecting comprehensive academic achievement.</p> <p>1.11 CAASPP Performance for Socio-Economically Disadvantaged (SED) Students: Percentage of socio-economically disadvantaged students meeting or exceeding CAASPP standards in Math and ELA, highlighting the effectiveness of targeted support.</p> <p>1.12 Accessibility to Instructional Materials: Percentage of students with full access to necessary instructional materials, ensuring equity in learning resources.</p> <p>1.13 Alignment with State Standards: Percentage of students whose education is fully aligned with state standards, promoting consistent educational quality.</p> <p>1.14 Community Belief in Robust Curriculum: Proportion of parents, students, and teachers who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.</p> <p>1.15 LREBG Action Growth in ELA and Math Among Intervention This action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our intervention programs. By increasing instructional personnel, Sage Oak is able to provide more consistent, small-group, and individualized support for students receiving Tier 2 and Tier 3 interventions. This enhancement directly supports the academic progress of students performing below grade level, particularly those from unduplicated groups and students with disabilities.</p> <p>The goal of this action is to equip students with the skills and confidence needed to meet or exceed grade-level standards. By embedding additional instructional capacity through LREBG-funded staff, we aim to accelerate learning and ensure that a greater percentage of intervention students experience at least one year of academic growth annually. This action reinforces our commitment to equitable access to a robust, rigorous curriculum, supported by the necessary resources and targeted instruction to help all students thrive.</p>		

Action #	Title	Description	Total Funds	Contributing
1.3	Enhancement of Math Proficiency for Students with Disabilities	<p>Improve math proficiency for students with disabilities by increasing the percentage of students with disabilities participating in math interventions.</p> <p>This action is dedicated to improving mathematics proficiency among students with disabilities by expanding their participation in specialized math intervention programs. Recognizing the unique challenges faced by these students, our targeted approach aims to elevate their math skills through personalized and adaptive learning strategies. By doing so, we endeavor to facilitate meaningful academic progress and reduce disparities in math achievement.</p> <p>Metrics for Effectiveness:</p> <p>1.16 Participation Rate in Math Interventions: Increase in the percentage of students with disabilities participating in math intervention programs, aiming to ensure comprehensive access to support services tailored to their needs.</p> <p>1.17 Increased iReady Math Achievement for Students with Disabilities (SWD): Measurement of the number of students with disabilities moving out of Tier 3 in iReady math assessments. Tier 3 represents students performing two or more years below grade level. While measuring achievement at or above grade level for this group may not be appropriate, monitoring their progress out of Tier 3 provides a meaningful indicator of improvement in math proficiency.</p> <p>1.18 California Assessment of Student Performance and Progress (CAASPP) for SWD Math Achievement: Analysis of CAASPP math scores for students with disabilities to track advancements in state-standardized math achievement, with a focus on increasing the percentage of students meeting or exceeding math standards.</p> <p>This action underscores our commitment to inclusivity and equity in education by specifically addressing the needs of students with disabilities. Through targeted math interventions, we aim not only to improve math proficiency but also to foster a supportive learning environment that acknowledges and addresses the diverse needs of our student population.</p>	\$76,694.00	No

Action #	Title	Description	Total Funds	Contributing
1.4	Unified Articulation Process Development	<p>Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.</p> <p>This action focuses on developing a unified, data-informed articulation process to ensure smooth transitions for students as they move through each grade band (e.g., from elementary to middle school, and middle school to high school). By integrating feedback from graduates and utilizing comprehensive data analysis, we aim to refine our educational pathways to better prepare students for the expectations and standards of their next academic phase. This process is designed to enhance communication between teachers across grade bands, ensure curriculum continuity, and address any potential gaps in student preparedness.</p> <p>Metrics for Effectiveness:</p> <p>1.19 Teacher Preparedness for Student Articulation: The percentage of teachers who feel equipped to effectively prepare and transition their students to the next grade level band. This metric will be measured through targeted surveys asking teachers if they feel confident in their ability to communicate the expectations and standards of the next grade level, ensuring they have the resources and knowledge necessary to support their students' progression.</p> <p>By establishing a comprehensive articulation process that leverages both quantitative data and qualitative feedback from our educational community, this action aims to foster a more cohesive and supportive learning environment. It ensures that students are not only academically prepared for each transition but also that educators feel supported and equipped to guide them effectively through their educational journey.</p>	\$0.00	No

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	Engagement: Fostering a Supportive and Engaging Learning Environment In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Building on Sage Oak's strategic commitment, Goal 2 aims to cultivate a supportive and engaging learning environment by emphasizing the well-being and professional growth of our staff, alongside fostering stronger connections within our school community. This goal is rooted in the belief that the success of our educational mission is intertwined with the development and satisfaction of our educators and staff. By investing in comprehensive professional development, mentorship programs, and creating a nurturing work environment, we aspire to empower our educators. This empowerment is expected to cascade, enhancing the educational experience for students and fostering a sense of belonging and community alignment with Sage Oak's mission and vision.

Sage Oak's efforts are influenced by feedback from the WASC visiting committee and include specific action steps aimed at increasing opportunities for parent and student engagement, developing purposeful professional growth pathways for staff, enhancing live instruction through targeted professional development, and establishing a robust system for social and emotional support. These targeted actions demonstrate Sage Oak's balanced approach to educational excellence, ensuring every member of our community is supported to thrive.

Furthermore, these initiatives directly contribute to increased or improved services for our unduplicated student populations, including socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. By creating a more engaging, supportive, and well-resourced learning environment, we aim to elevate the educational outcomes and well-being of these students, ensuring that our programs and resources are tailored to meet their specific needs and challenges. This aligns with our objectives to deliver equitable, high-quality educational opportunities, making significant strides in supporting all students, particularly those who require additional assistance, to achieve success and reach their full potential.

Through increased staffing funded by the Learning Recovery Emergency Block Grant (LREBG), Sage Oak is expanding access to social-emotional supports as outlined in Goal 2, Action 4. This targeted investment strengthens our ability to meet the diverse needs of all students, supporting their academic growth, social-emotional well-being, and readiness for future college and career pathways. This approach reflects Sage Oak's continued commitment to equitable, high-quality educational opportunities for every learner.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintenance of Positive Community Engagement Perception % of parents, students, and staff that believe Sage Oak makes a significant effort to foster community engagement	Parents 99% Students 96% Staff 100% Source: Internal 23-24	Parents 87% Students 92% Staff 97%		90% or higher	Parents -12% Students-4% Staff -3%
2.2	Maintain 100% Credentialed Teachers % of credentialed teachers	100% Source: Internal 23-24	100%		100%	0
2.3	Maintenance of High Attendance Rate % of school attendance rates (ADA)	99.9% Source: Internal 23-24	99.5%		98% or higher	0.4%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.4	Maintenance of Low Chronic Absenteeism % of chronic absenteeism	0.8% Source: CA Dashboard 22-23	0%		Less than 3%	-.8%
2.5	Maintenance of Low Suspension and Expulsion Rates % suspension and expulsion rates	Suspension 0% Expulsion 0% Source: CA Dashboard and Dataquest 22-23	Suspension 0% Expulsion 0%		Suspension 0% Expulsion 0%	Suspension 0% Expulsion 0%
2.6	Maintain Positive Connection to School's Mission % of the parents, students and staff that feel connected to the school's mission	Parents- 90% Students- 81% Staff- 96% Source: Internal 23-24	Parents 92% Students 89% Staff 95%		Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents 2% Students 8% Staff -1%
2.7	Increased Student Retention Rate student retention rate	59% Source: Internal 22-23	73%		75%	14%
2.8	Maintain Positive School Climate % of the parents, students and staff that feel that the school	Parents 97% Students 98% Staff 97%	Parents 99% Students 100% Staff 99%		Parents 90% or higher Students 90% or higher	Parents 2% Students 2% Staff 2%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	prioritizes safety, value and respect	Source: Internal 23-24			Staff 90% or higher	
2.9	Confidence and Integration of New Strategies % of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles	100% Source: Internal 23-24	100%		100%	0
2.10	Increased Retention Rates of Participating Staff retention rates of staff members who have participated in the professional development pathways	72% Source: Internal 23-24	83%		80%	11%
2.11	Expansion of Professional Development Opportunities # of professional development opportunities offered to	4 Source: Internal 23-24	6		10	2

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	staff, focusing on live instruction					
2.12	Improved Staff Confidence in Job Performance % of staff who believe they are well-equipped by Sage Oak to perform their roles effectively	96% Source: Internal 23-24	97%		90% or higher	1%
2.13	Increased Awareness of Socio-Emotional Resources % of parents, students, and staff that report feeling informed about the social and emotional resources provided by Sage Oak	Parents- 85% Students- 93% Staff- 93% Source: Internal 23-24	Parents 91% Students 90% Staff 94%		Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 6% Students -3% Staff 1%
2.14	Expansion of Synchronous Support Opportunities # of synchronous support groups or classes with counselors	23 Source: Internal 23-24	66		29	43

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

For the 2024–2025 academic year, Goal 2 focused on increasing student engagement and improving attendance by cultivating a positive instructional culture, enhancing live synchronous learning, expanding professional development aligned to instructional quality, and maintaining a strong school climate. A particular emphasis was placed on improving instructional strategies used during live synchronous sessions to ensure increased student engagement and academic support for all student groups.

The core areas of implementation included:

Providing multiple rounds of professional development with a key focus on live instruction;

Strengthening staff confidence, leadership qualities, and instructional consistency;

Maintaining low rates of suspension, expulsion, and chronic absenteeism;

Increasing student access to social-emotional learning (SEL) resources and real-time supports by also utilizing LREBG funds to increase staffing.

These actions were fully launched and sustained throughout the year, demonstrating strong alignment with the original LCAP action plan.

While all key actions were implemented, a few notable differences emerged:

Professional Development Expansion Beyond Baseline: Sage Oak implemented six professional development sessions, increasing from four in 23-24. These sessions provided teachers with hands-on learning in research-based strategies, including cognitive task analysis (CTA), visible learning goals (VLG), and classroom discussion techniques. Sessions were grounded in John Hattie's visible learning research and equipped teachers with high-impact strategies that were both practical and classroom-ready. This marked a clear step forward in building a more robust instructional culture.

Expansion of Synchronous Instruction Professional Development: To support implementation of high-leverage instructional strategies, Sage Oak also provided targeted training on technology platforms such as Nearpod, Classkick, Canva, and MagicSchool AI. This shift allowed instructors to directly apply tools that enhance student engagement and formative assessment during live classes as well as to explore and apply evidence-based strategies, such as cognitive task analysis, classroom discussion techniques, and the use of visible learning goals, well beyond the original plan.

SEL System Growth: Access to real-time SEL support expanded from 23 to 66 counselor-led sessions, directly contributing to improved awareness and use of resources across campuses.

Keppel experienced an outstanding retention increase from 59% to 73%, highlighting stronger student commitment and the effectiveness of targeted academic and emotional support systems.

Minor Challenge Encountered

Professional Development Pacing and Depth: Reflecting on teacher feedback showed some professional development sessions covered dense content in short timeframes. Future iterations may benefit from spreading content over time to allow deeper skill-building.

Successes in Implementation

School Climate and Connection Metrics Improved

School Climate:

Students: 95 %+ reported feeling safe, valued, and respected.

Parents: 90–99% reported strong satisfaction with the school environment.

Staff: Reported 99% alignment with a positive, respectful climate.

Parent Advisory Council Insight: Parents highlighted the personalized learning model and strong advisor relationships as standout strengths that contributed to their child's academic success and emotional well-being.

Student retention rate grew from 59% to 73%.

Connection to Mission:

Student connections to Sage Oak's mission rose to 89%.

Awareness of SEL Supports:

90 %+ of students and staff, and over 91% of parents, reported feeling informed about the availability of SEL services and resources.

Parent Advisory Council feedback also emphasized increased visibility of mental health resources and proactive outreach from SEL counselors as key contributors to a supportive school environment.

Instructional and Staff Support Strengthened

Professional Development Reach and Effectiveness: Six targeted sessions reached all instructors, with structured implementation of strategies like visible learning goals and cognitive task analysis. Staff reported high relevance and practical use.

Zero Suspension/Expulsion Rates: Continued success in maintaining 0% suspension and expulsion rates reflects a healthy and proactive school culture.

Strong ADA Performance: Average daily attendance remained very high at 99.5%.

Leadership Pathway: Purposeful pathways for staff growth strengthened confidence and implementation of new strategies.

Sage Oak's implementation of Goal 2 in 2024–2025 achieved strong results in the areas of school climate, live instructional practice, professional development success, and Socio-Emotional Learning resource access. Student retention increased significantly, reflecting stronger student commitment and improved systems of support. The continued emphasis on school safety, connection, and instructional quality—evident in overwhelmingly positive student, staff, and parent perceptions—demonstrates meaningful and sustained growth. Notably, positive feedback from the Parent Advisory Council reinforced the value of personalized academic support, strong advisor relationships, and visible SEL services. Together, these strengths reflect Sage Oak's deep commitment to student well-being and instructional excellence. These outcomes provide a solid foundation to refine retention strategies and deepen social-emotional engagement in the year ahead.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on actions 2.2 and 2.3 related to increased expenditures for professional development

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Highly Effective

The actions implemented under Goal 2—focused on building a supportive school climate, strengthening live synchronous instruction, and expanding SEL access—have been largely effective in meeting the goal's intended outcomes. Key indicators such as student retention, school safety, connection to mission, staff confidence, and Socio-Emotional Learning awareness all showed significant improvement, reflecting strong alignment between planned actions and measurable impact.

Enhancing Community Connection Opportunities - Highly Effective

This action supported campus-wide engagement systems that contributed to:

97 %+ of students and staff feel connected to the school mission;

Strong community perception scores: 90 %+ of families and students reported feeling valued, safe, and respected;

Continued 0% suspension and expulsion rates across all schools.

Student retention rate increased to 73%, positively impacting student achievement and engagement.

These outcomes suggest that the action was effective in fostering a positive and inclusive school environment.

Development of Professional Growth Pathways - Effective with Continued Potential

Participation in leadership pathways and professional development programs resulted in:

100% of participants reported increased confidence in using new strategies;

Staff retention among professional development participants improved to 83%, a strong indicator of job satisfaction and institutional alignment.

The action shows a clear impact on instructional culture and talent development. Ongoing refinement of professional development alignment with instructional practice will support even deeper results.

Enhancement of Professional Development for Live Instruction - Highly Effective

Six professional development sessions were conducted, surpassing the baseline of four.

Sessions were tailored using adult learning theory and emphasized role-based collaboration and implementation strategies.

Staff adopted new tools (e.g., Classkick, MagicSchool AI) and visible learning practices with high fidelity.

High perception of staff confidence in feeling equipped to perform their job based on the professional development received.

This action had a direct impact on instructional consistency and teacher preparedness for live, synchronous settings.

Development of Social and Emotional Support Systems - Strongly Effective

Synchronous SEL sessions more than doubled from 23 to 66, and:

Over 90% of families, students, and staff reported being informed about SEL resources.

SEL access and awareness improved, supporting chronic absenteeism rates well below 3%.

Sage Oak Keppel added dedicated teachers using LREBG funds to ensure every student has access to resources.

This action contributed meaningfully to the overall school climate and student engagement, particularly for students needing SEL Tier 1–2 support.

Conclusion

Most actions under Goal 2 were effective or highly effective in strengthening the school climate, increasing staff instructional capacity, and expanding SEL access. All actions under Goal 2 proved effective or highly effective in strengthening school climate, enhancing staff instructional capacity, expanding SEL access, and improving student retention.

These aligned efforts resulted in measurable gains across key indicators and reinforced the effectiveness of the school's strategic approach. The foundation built through this year's implementation sets a strong trajectory for continued success and deeper impact in the next LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Goal 2, Action 4 has been strengthened through the integration of Learning Recovery Emergency Block Grant (LREBG) funding to expand staffing and enhance the delivery of social-emotional supports and intervention services. This strategic use of funds supports increased access to counselors, SEL sessions, and individualized outreach for students requiring additional support—reflected in Metrics 2.13 and 2.14.

This enhancement enables Sage Oak to proactively meet the needs of a growing number of students identified for Tier 2 and Tier 3 social-emotional and academic interventions. The goal is to ensure every student has access to timely, responsive services that foster well-being, increase readiness to learn, and contribute to long-term academic success. These adjustments affirm Sage Oak's commitment to equity-driven, data-informed planning that empowers all students to thrive.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Enhancing Community Connection Opportunities	<p>Increase opportunities for parents and students to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision.</p> <p>This action is dedicated to increasing opportunities for meaningful engagement among parents, students, and school leadership. By fostering a deeper sense of community and ensuring alignment with the school's mission and vision, we aim to create an inclusive environment that supports professional growth and student success. Initiatives will include structured forums for feedback, engagement events, and clear communication channels that encourage active participation from all members of our school community.</p> <p>Metrics for Effectiveness:</p> <p>2.1 Community Engagement Perception: Measurement of the community's perception regarding the school's efforts to provide opportunities for involvement and input. This will be assessed through surveys asking if participants believe Sage Oak makes a significant effort to foster community engagement.</p> <p>2.2 Retention of Credentialed Teachers: Maintaining a 100% rate of credentialed teachers, ensuring that students have access to qualified and dedicated professionals.</p> <p>2.3 Attendance Rate Stability: Maintenance of school attendance rates at optimal levels, reflecting student engagement and a supportive learning environment.</p> <p>2.4 Low Chronic Absenteeism: Sustaining low rates of chronic absenteeism, indicating an engaging and welcoming school climate that motivates regular attendance.</p> <p>2.5 Low Suspension and Expulsion Rates: Keeping suspension and expulsion rates minimal, demonstrating effective behavior management and a positive school culture.</p> <p>2.6 Connection to School's Mission: Proportion of the school community that feels connected to the school's mission of empowering students, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives.</p> <p>2.7 Student Retention Rate Improvement: An increase in the student retention rate, indicating success in creating a supportive and engaging</p>	\$441,845.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>environment that encourages students to continue their education at Sage Oak.</p> <p>2.8 School Climate: Proportion of the school community that feels safe, respected and values, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives.</p> <p>Through these targeted actions and metrics, we aim to not only enhance the sense of community and engagement within our school but also to ensure that our educational environment is conducive to professional growth, student success, and sustained participation from our entire school community.</p>		
2.2	Development of Professional Growth Pathways	<p>Develop purposeful pathways for growth and opportunities for professional development.</p> <p>This action focuses on creating purposeful pathways for professional growth, offering expansive opportunities for all staff members to develop. By initiating comprehensive leadership and professional development programs, we aim to equip our staff with the skills and confidence necessary to innovate and enhance their respective practices across the board. This initiative is designed to cultivate a culture that values continuous learning, adaptability, and professional excellence, contributing significantly to the overall effectiveness and sustainability of our educational environment.</p> <p>Metrics for Effectiveness:</p> <p>2.9 Confidence and Integration of New Strategies: The proportion of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles. This will be assessed through surveys that inquire about their readiness to incorporate these strategies into future practices, reflecting the professional development programs' impact on enhancing staff capabilities.</p> <p>2.10 Retention Rates of Participating Staff: The retention rates of staff members who have participated in the professional development pathways will be closely monitored. A positive trend in these rates would indicate the</p>	\$143,590.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>success of the development opportunities in promoting job satisfaction, personal growth, and a strong commitment to the institution.</p> <p>This action underscores our dedication to fostering professional growth and development across all staff levels, enhancing our school's capacity to provide a high-quality, supportive, and engaging learning environment for all community members.</p>		
2.3	Enhancement of Professional Development for Live Instruction	<p>Increase professional development for live instruction.</p> <p>This action targets the expansion of professional development opportunities tailored to live instruction, aiming to empower our staff with the skills and techniques necessary for dynamic and effective real-time teaching. By providing a diverse array of training sessions, workshops, and seminars focused on live instructional strategies, we are committed to ensuring that all staff members feel confident and well-prepared to engage students in a live setting. This initiative is designed to elevate the quality of live instruction, ensuring that our educational delivery is both impactful and engaging.</p> <p>Metrics for Effectiveness:</p> <p>2.11 Expansion of Professional Development Opportunities: Tracking the increase in professional development opportunities offered to staff, focusing on live instruction. This metric will encompass school-created programs and external training opportunities included in our professional development portfolio.</p> <p>2.12 Staff Confidence in Job Performance: The percentage of staff who believe they are well-equipped by Sage Oak to perform their roles effectively, particularly in the context of live instruction, based on the professional development received. This will be measured through surveys assessing staff perceptions of their preparedness and the adequacy of professional development support provided by the school.</p> <p>Through this targeted approach to professional development, we aim to not only enhance the effectiveness of live instruction but also to foster a culture</p>	\$26,250.00	Yes

Action #	Title	Description	Total Funds	Contributing
		of continuous learning and adaptability among our staff. This action reaffirms our commitment to supporting professional excellence and student success in every live instructional encounter.		
2.4	Development of Social and Emotional Support Systems	<p>Develop a system to increase access and consistency for social and emotional resources and interventions.</p> <p>This action is dedicated to developing a comprehensive system designed to increase access to and consistency of social and emotional resources and interventions for our school community. Recognizing the critical importance of social and emotional well-being in educational success, we aim to ensure that students, parents, and teachers are well-informed and have easy access to the support services they need. Through this initiative, we will enhance our existing resources, introduce new interventions, and expand synchronous support opportunities, such as groups or classes led by counselors, to address the diverse needs of our community effectively.</p> <p>Additionally, this action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our counseling offerings.</p> <p>Metrics for Effectiveness:</p> <p>2.13 Awareness of Socio-Emotional Resources: The percentage of parents, students, and teachers that report feeling informed about the social and emotional resources provided by Sage Oak. This measure will assess the effectiveness of our communication strategies and the accessibility of our resources.</p> <p>2.14 Expansion of Synchronous Support Opportunities: The increase in the number of synchronous support groups or classes with counselors, reflecting our commitment to providing real-time, interactive support sessions that cater to the emotional and social needs of our students. By implementing this action, we aim to create a nurturing and supportive environment that prioritizes the social and emotional well-being of our students. This comprehensive support system will not only address</p>	\$41,361.00	Yes

Action #	Title	Description	Total Funds	Contributing
		immediate needs but also contribute to the long-term resilience and success of our school community.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	Conditions of Learning: Efficient Operations with a Focus on Sustainability Leverage technologies, specifically Artificial Intelligence, to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning) Priority 2: State Standards (Conditions of Learning) Priority 4: Pupil Achievement (Pupil Outcomes) Priority 7: Course Access (Conditions of Learning) Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Understanding the importance of future-proofing its educational approach, Sage Oak integrates robust systems that prioritize sustainability and efficiency into its strategic plan. This initiative focuses on streamlining operations, optimizing resources, and adopting sustainable practices, aligning with the school's mission and values. By leveraging Artificial Intelligence and other advanced technologies, Sage Oak aims to provide personalized learning pathways, ensuring education is more accessible, engaging, and effective for students. This forward-thinking approach prepares the Sage Oak community for a rapidly evolving educational landscape, embodying the school's commitment to innovation and excellence. Sage Oak's current staff-to-student ratio of 13:1 highlights our dedicated investment in staffing to ensure personalized learning. With efforts to enhance operational efficiency, we anticipate a more optimized staff-to-student ratio. This adjustment will enable us to extend our educational reach without compromising the quality of instruction. By streamlining administrative tasks, teachers can dedicate more attention to enriching student interactions, further improving the educational experience. This strategic approach ensures that resources are maximized for the direct benefit of our students, aligning with our mission to provide high-quality, focused education.
--

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Staff to Student Ratio Improvement staff to student ratio	13:1 Source: Internal 22-23	13:1		19:1	0
3.2	Improved Work Efficiency and Satisfaction % of staff reporting noticeable improvements in work efficiency and satisfaction	93% Source: Internal 22-23	92%		90% or higher	-1%
3.3	Increased Staff Confidence in Using AI Tools % of staff reporting confidence in their ability to use AI tools to improve learning outcomes	79% Source: internal 23-24	91%		90% or higher	12%

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Goal 3 was developed to promote efficient, sustainable school operations and innovative instructional systems through the strategic integration of Artificial Intelligence (AI) and other advanced technologies. These systems were designed to streamline internal processes, improve staff productivity, and empower educators to deliver personalized learning pathways for students. The focus for 2024–2025 was on establishing foundational tools and practices that enhance both operational efficiency and academic effectiveness.

Two primary actions drove implementation:

Technology Optimization for Enhanced Operations, targeting back-end systems and staff workflows.

AI-Driven Personalized Learning Implementation, aimed at increasing staff capacity to use AI tools for instructional planning and student support.

These efforts laid the groundwork for increased staff satisfaction, improved staff-to-student ratios, and an innovative educational model responsive to student needs.

While all major action steps were initiated, there were a few substantive implementation shifts and enhancements:

Focus on Foundational AI Training: Although AI tools were introduced with the intent of deep classroom integration, Year 1 focused more heavily on building staff confidence and familiarity with AI tools like MagicSchool AI and ChatGPT for lesson planning and data analysis, rather than direct instructional use. This adjustment was intentional and acknowledged the steep learning curve for many educators.

Technology Integration for Support Functions: Implementation also prioritized the automation of routine tasks (e.g., calendaring, internal form processing, survey analysis) before full integration into student-facing systems. This choice maximized short-term impact on operational efficiency while giving instructional teams time to build readiness.

Minor Challenges Encountered

Staff Learning Curve with AI Tools: A key challenge was the varying levels of technology comfort among staff, especially when shifting from traditional tools to AI-enhanced platforms. While professional development was provided, some staff required additional time and support to adopt new workflows.

Complexity of Measuring AI Impact on Student Learning: While staff confidence and operational workflows showed visible improvements, the direct impact of AI on student learning outcomes was harder to isolate and quantify within the first year. This limited the ability to fully assess the academic effectiveness of personalized AI-driven learning strategies.

System Integration and Scalability: Implementing scalable, unified platforms across all school sites proved more complex than anticipated. Aligning digital systems with existing workflows required ongoing coordination between technology, instruction, and administration teams.

Successes in Implementation

Positive Staff-to-Student Ratio Trends: The staff-to-student ratio remains at 13:1, consistent with the baseline from prior years. While the target ratio of 19:1 remains a future goal tied to long-term automation and operational streamlining, the metric has not yet shifted. This underscores that 2024–2025 was a foundational year, focused on building the systems and capacity necessary to enable future scaling.

Staff Satisfaction and Operational Efficiency Gains: Internal surveys showed that 92% of targeted staff reported improvements in work efficiency and satisfaction. Streamlining scheduling, attendance tracking, and instructional prep with AI-supported tools significantly reduced time on routine tasks.

Staff Confidence in AI Readiness: 91% of staff reported confidence in using AI tools to improve learning outcomes—a foundational win that sets the stage for more advanced applications in Year 2.

Instructional Adaptability: Staff began incorporating AI tools into lesson planning, progress monitoring, and assessment feedback. This adaptability helped align personalized learning strategies to individual student needs, especially in virtual and hybrid learning contexts.

The first year of Goal 3 implementation laid a strong operational and instructional foundation for long-term sustainability and innovation. While some of the deeper academic impacts of AI-driven personalization will require continued development and measurement, the improvements in staff efficiency, tool readiness, and system scalability are already enhancing learning conditions across campuses. These

successes confirm that Sage Oak is well-positioned to expand AI use and maximize its impact on teaching, learning, and operational excellence in the years ahead.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on actions 3.1 and 3.2 related to increased expenditures for enhancing the schools technology operations and development for artificial intelligence personalized learning.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The specific actions under Goal 3—focused on technology optimization and AI-driven personalized learning—were implemented and show emerging effectiveness. While most measurable outcomes are still in early stages or pending full implementation, important groundwork was laid to support future gains in operational efficiency, instructional innovation, and scalable systems.

Technology Optimization for Enhanced Operations - Strongly Effective

This action centered on streamlining Sage Oak's internal operations using automation and smarter technology workflows. While staff-to-student ratio improvements (from the baseline of 13:1) were maintained from year 1, the implementation of AI-assisted scheduling, form processing, and internal workflow tools significantly improved work satisfaction and productivity.

92% of staff surveyed reported improved work efficiency and satisfaction, indicating a continual shift toward more streamlined operations. Automation tools were deployed to reduce administrative burden, though the longitudinal impact on staffing efficiency will be more visible in Years 2–3.

AI-Driven Personalized Learning Implementation - Foundational Progress with Early Signs of Impact

91% of staff reported confidence in using AI tools to support instruction, 12 points up from the baseline, signaling strong early uptake.

AI tools were successfully incorporated into lesson planning, formative assessment, and curriculum design in limited pilot settings. Broader adoption into instructional practice is still in progress and will require additional professional development and model-sharing in Year 2. Staff confidence has grown substantially, positioning this action as effective in building capacity, though full implementation and measurable student outcomes are still forthcoming.

Actions under Goal 3 show early-stage effectiveness, particularly in building staff readiness and improving operational workflows. Staff satisfaction and AI tool adoption are trending positively, which lays a solid foundation for Year 2 impact. However, metrics like staff-to-student ratio and academic impact of personalized AI strategies remain aspirational targets, with outcomes expected to materialize as systems mature.

Continued professional development, targeted AI use cases, and a strategic focus on scalability will be essential to turning this year's investments into long-term, measurable improvements in both operations and learning outcomes.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes were made to the planned goal, metrics, target outcomes, or action for the coming year.

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Technology Optimization for Enhanced Operations	<p>Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.</p> <p>This action is centered on the critical evaluation, integration, and optimization of technology, with a particular emphasis on Artificial Intelligence (AI), to streamline and automate operational processes and procedures across our institution. By harnessing advanced technologies, we aim to significantly improve operational efficiency, reduce manual workload, and foster an environment that supports sustainable growth and academic excellence. This initiative will involve a comprehensive review of current technologies, identification of automation opportunities, and the strategic implementation of technological solutions to meet our operational goals.</p> <p>Metrics for Effectiveness:</p> <p>3.1 Staff-to-Student Ratio Improvement: Monitoring changes in the staff-to-student ratio as a direct outcome of technological optimizations, aiming for a more effective and efficient distribution of resources.</p> <p>3.2 Work Efficiency and Satisfaction: The percentage of staff reporting noticeable improvements in work efficiency and satisfaction following the implementation of new technology solutions. This metric will be assessed through surveys designed to capture staff perceptions of the impact of technological advancements on their daily operations and overall job satisfaction.</p> <p>Through this initiative, we aim to leverage cutting-edge technology to create a more streamlined, efficient, and sustainable operational</p>	\$312,384.00	No

Action #	Title	Description	Total Funds	Contributing
		framework that supports our educational mission and enhances the conditions of learning for our students and staff.		
3.2	AI-Driven Personalized Learning Implementation	<p>Implement AI-driven personalized learning strategies to maximize student learning.</p> <p>This action aims to implement Artificial Intelligence (AI)-driven personalized learning strategies to maximize student learning outcomes. By harnessing the power of AI, we plan to tailor educational content and instruction to meet the individual needs of each student, thereby enhancing learning efficiency, engagement, and academic achievement. This initiative will involve training staff to effectively use AI tools and integrate them into our curriculum to provide a more adaptive and responsive learning experience for students.</p> <p>Metrics for Effectiveness:</p> <p>3.3 Staff Confidence in Using AI Tools: The percentage of staff reporting confidence in their ability to use AI tools to improve learning outcomes, based on the training received. This metric will assess the effectiveness of professional development programs in equipping staff with the necessary skills to implement AI-driven instructional strategies.</p> <p>Through the adoption of AI-driven personalized learning strategies, we aim to create a more engaging, inclusive, and effective educational environment that caters to the diverse learning styles and needs of our students, thereby supporting our mission of fostering academic growth and operational efficiency.</p>	\$39,698.00	Yes

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2025-26]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$338,634	\$

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
\$ 3,638,628	0.000%	\$0.00	

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	<p>Action: Integration of Career, Community, and Life Skills</p> <p>Need: All students, including unduplicated students, require enhanced access to career, community, and life skills education due to historical inequities and limited access to external resources.</p>	This action provides enhanced access to career, community, and life skills education through dedicated synchronous courses and counseling supports (Action 1.1). While offered LEA-wide, the curriculum and support are intentionally designed with differentiated content and targeted outreach to ensure unduplicated students, who historically have less access to these resources, receive services that are increased in intensity and improved in quality and relevance compared to a universal offering without these	Completion of A-G Requirements, Career Technical Education (CTE) Pathway Completion, Percentage of Students Achieving a Score of 3 or Higher on AP Exams.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	targeted elements. This is the most effective approach to ensure equitable access and outcomes across the geographically diverse LEA.	
1.2	Action: Refinement of Multi-Tiered System of Support Need: Unduplicated students demonstrate persistent academic achievement gaps and socio-emotional needs requiring intensified and differentiated support. Scope: LEA-wide	This action refines the LEA-wide MTSS to provide increased levels of targeted, small-group instruction and improved socio-emotional supports (Action 1.2), particularly for unduplicated students identified through data analysis. The LEA-wide scope ensures consistent access to these tiered interventions across all locations, but the design and resource allocation (including LREBG-funded staffing) are principally directed towards and intensified for unduplicated pupils to accelerate their academic growth and address well-being challenges more effectively than a universal support system.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.1	Action: Enhancing Community Connection Opportunities Need: Foster youth, English learners, and low-income students often face barriers to full participation in school activities, which can affect their sense of belonging and engagement with the school community. Scope: LEA-wide	Increasing community connection opportunities addresses this need by creating inclusive, accessible engagement activities that encourage participation from all students and their families, regardless of background. This action aims to build a stronger, more cohesive school community where unduplicated students feel valued and supported.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
2.2	<p>Action: Development of Professional Growth Pathways</p> <p>Need: Educators require ongoing professional development to effectively meet the diverse needs of all students, fostering an engaging and supportive learning environment.</p> <p>Scope: LEA-wide</p>	Providing professional growth pathways for all educators ensures a high-quality educational experience for every student, including unduplicated students. This school wide action supports the continuous improvement of teaching strategies that directly benefit these groups by enhancing educators' skills and knowledge.	Increased Confidence and Integration of New Strategies by staff, and retention rates of participating staff, which indirectly reflect the improved educational environment for unduplicated students.
2.3	<p>Action: Enhancement of Professional Development for Live Instruction</p> <p>Need: Effective live instruction requires specific pedagogical skills, particularly to engage unduplicated students who may have varied learning needs and preferences.</p> <p>Scope: LEA-wide</p>	Enhancing professional development for live instruction across the LEA ensures that all educators are equipped to deliver engaging, high-quality live instruction that caters to the diverse needs of all students, including unduplicated groups. This approach is crucial for maintaining student engagement and improving learning outcomes.	Expansion of Professional Development Opportunities focusing on live instruction, and improvement in staff confidence in job performance, particularly in engaging and instructing unduplicated students effectively.
2.4	<p>Action: Development of Social and Emotional Support Systems</p> <p>Need: Unduplicated students, particularly foster youth, English learners, low-income, and homeless students, face significant socio-</p>	This action develops an LEA-wide system to increase access to and improve the consistency and targeting of social and emotional resources and interventions (Action 2.4). While available to all, the system is designed with specific components, such as dedicated counselor support and tailored interventions (including LREBG-funded staffing), that are principally directed towards and intensified for unduplicated students	Awareness of Socio-Emotional Resources, Expansion of Synchronous Support Opportunities

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	emotional barriers impacting their educational success. Scope: LEA-wide	to address their unique and heightened socio-emotional needs more effectively than a universal approach. The LEA-wide scope ensures equitable access to these intensified supports across all locations.	
3.2	Action: AI-Driven Personalized Learning Implementation Need: English learners and low-income students, in particular, benefit from personalized learning strategies that tailor instruction to their unique needs and learning styles, addressing gaps in knowledge and accelerating progress. Scope: LEA-wide	Implementing AI-driven personalized learning strategies on a schoolwide basis ensures that all students, especially unduplicated students, receive customized educational experiences designed to maximize their learning potential. This approach is critical for closing achievement gaps and supporting the academic growth of each student.	Increased Staff Confidence in Using AI Tools, Staff to Student Ratio Improvement, Improved Work Efficiency and Satisfaction.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
-------------------	--------------------	---	------------------------------------

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

--

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

n/a

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	n/a	n/a
Staff-to-student ratio of certificated staff providing direct services to students	n/a	n/a

2025-26 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	\$ 3,638,628	\$338,634	\$ 3,638,628	0.000%	

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$5,092,165.00	\$1,449,815.00	\$0.00	\$76,105.00	\$6,618,085.00	\$4,918,551.00	\$1,699,534.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Integration of Career, Community, and Life Skills	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$3,931,748.00	\$1,136,952.00	\$4,029,986.00	\$1,024,894.00	\$0.00	\$13,820.00	\$5,068,700.00	
1	1.2	Refinement of Multi-Tiered System of Support	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$434,920.00	\$32,643.00	\$190,074.00	\$215,204.00	\$0.00	\$62,285.00	\$467,563.00	
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	Students with Disabilities	No			All Schools	Fiscal 2025-26	\$0.00	\$76,694.00	\$1,334.00	\$75,360.00	\$0.00	\$0.00	\$76,694.00	
1	1.4	Unified Articulation Process Development	All	No			All Schools	Fiscal 2025-26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
2	2.1	Enhancing Community Connection Opportunities	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$405,623.00	\$36,222.00	\$440,351.00	\$1,494.00	\$0.00	\$0.00	\$441,845.00	
2	2.2	Development of Professional Growth Pathways	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$143,590.00	\$70,243.00	\$73,347.00	\$0.00	\$0.00	\$143,590.00	
2	2.3	Enhancement of Professional Development for Live Instruction	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$26,250.00	\$26,250.00	\$0.00	\$0.00	\$0.00	\$26,250.00	
2	2.4	Development of Social and Emotional Support Systems	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$41,361.00	\$0.00	\$0.00	\$41,361.00	\$0.00	\$0.00	\$41,361.00	
3	3.1	Technology Optimization for Enhanced Operations	All	No			All Schools	Fiscal 2025-26	\$104,899.00	\$207,485.00	\$305,733.00	\$6,651.00	\$0.00	\$0.00	\$312,384.00	

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
3	3.2	AI-Driven Personalized Learning Implementation	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$39,698.00	\$28,194.00	\$11,504.00	\$0.00	\$0.00	\$39,698.00	

2025-26 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$ 3,638,628	\$338,634	\$ 3,638,628	0.000%		\$4,785,098.00	0.000%	0.000 %	Total:	\$4,785,098.00
								LEA-wide Total:	\$4,785,098.00
								Limited Total:	\$0.00
								Schoolwide Total:	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Integration of Career, Community, and Life Skills	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$4,029,986.00	
1	1.2	Refinement of Multi-Tiered System of Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$190,074.00	
2	2.1	Enhancing Community Connection Opportunities	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$440,351.00	
2	2.2	Development of Professional Growth Pathways	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$70,243.00	
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$26,250.00	
2	2.4	Development of Social and Emotional Support Systems	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$0.00	
3	3.2	AI-Driven Personalized Learning Implementation	Yes	LEA-wide	English Learners Foster Youth	All Schools	\$28,194.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
					Low Income			

2024-25 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$4,839,419.00	\$5,324,273.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Integration of Career, Community, and Life Skills	Yes	\$4,004,537.00	\$4,299,901.00
1	1.2	Refinement of Multi-Tiered System of Support	Yes	\$265,576.00	\$247,097.00
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	No	\$41,721.00	\$94,662.00
1	1.4	Unified Articulation Process Development	No	\$150.00	\$0.00
2	2.1	Enhancing Community Connection Opportunities	Yes	\$279,668.00	\$266,703.00
2	2.2	Development of Professional Growth Pathways	Yes	\$51,087.00	\$95,246.00
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	\$15,438.00	\$25,321.00
2	2.4	Development of Social and Emotional Support Systems	Yes	\$32,758.00	\$32,542.00
3	3.1	Technology Optimization for Enhanced Operations	No	\$135,790.00	\$229,264.00
3	3.2	AI-Driven Personalized Learning Implementation	Yes	\$12,694.00	\$33,537.00

2024-25 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$670,010	\$3,762,851.00	\$4,002,957.00	(\$240,106.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Integration of Career, Community, and Life Skills	Yes	\$3,288,331.00	\$3,509,423.00		
1	1.2	Refinement of Multi-Tiered System of Support	Yes	\$129,561.00	\$97,351.00		
2	2.1	Enhancing Community Connection Opportunities	Yes	\$279,668.00	\$266,703.00		
2	2.2	Development of Professional Growth Pathways	Yes	\$36,549.00	\$69,334.00		
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	\$15,438.00	\$25,321.00		
2	2.4	Development of Social and Emotional Support Systems	Yes	\$610.00	\$1,288.00		
3	3.2	AI-Driven Personalized Learning Implementation	Yes	\$12,694.00	\$33,537.00		

2024-25 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$4,583,144.00	\$670,010	0	14.619%	\$4,002,957.00	0.000%	87.341%	\$0.00	0.000%

Local Control and Accountability Plan Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at LCFF@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in EC sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statutes of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2025-26, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
 - If the LEA has unexpended LREBG funds the LEA must provide the following:
 - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
 - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
 - An explanation of how the action is aligned with the allowable uses of funds identified in [EC Section 32526\(c\)\(2\)](#); and
 - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by [EC Section 32526\(d\)](#).
 - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the [LREBG Program Information](#) web page.
 - Actions may be grouped together for purposes of these explanations.
 - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
 - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32526(d), to provide the information identified above or to include actions funded with LREBG funds within the 2025-26, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Requirements

Requirements

School districts and COEs: [EC Section 52060\(g\)](#) and [EC Section 52066\(g\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Charter schools: [EC Section 47606.5\(d\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062](#);
 - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see [Education Code Section 52068](#); and
- For charter schools, see [Education Code Section 47606.5](#).

- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
 - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
 - Inclusion of metrics other than the statutorily required metrics
 - Determination of the target outcome on one or more metrics
 - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
 - Inclusion of action(s) or a group of actions
 - Elimination of action(s) or group of actions
 - Changes to the level of proposed expenditures for one or more actions
 - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
 - Analysis of effectiveness of the specific actions to achieve the goal
 - Analysis of material differences in expenditures
 - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
 - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
 - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
 - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
 - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
 - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: [EC Section 42238.024\(b\)\(1\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad Goal

Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.

- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.
- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
 - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
 - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.
- **Required metrics for actions supported by LREBG funds:** To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.
 - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> • Enter the metric number.
Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
 - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
 - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
 - Indicate the school year to which the baseline data applies.
 - The baseline data must remain unchanged throughout the three-year LCAP.
 - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
 - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
 - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- **Note for Charter Schools:** Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
 - **Note for Charter Schools:** Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
 - **Note for Charter Schools:** Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 . Leave blank until then.	Enter information in this box when completing the LCAP for 2026–27 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 and 2026–27 . Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
 - Include a discussion of relevant challenges and successes experienced with the implementation process.
 - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
 - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
 - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
 - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
 - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
 - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
 - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
 - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
 - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
 - Professional development for teachers.
 - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
 - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
 - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
 - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to [EC Section 32526\(d\)](#). For information related to the required needs assessment please see the Program Information tab on the [LREBG](#)

[Program Information](#) web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the [California Statewide System of Support LREBG Resources](#) web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32526(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in [EC Section 32526\(c\)\(2\)](#).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
 - Identify the action as an LREBG action;
 - Include an explanation of how research supports the selected action;
 - Identify the metric(s) being used to monitor the impact of the action; and
 - Identify the amount of LREBG funds being used to support the action.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 CCR Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

Total Projected LCFF Supplemental and/or Concentration Grants

2025-26 Local Control and Accountability Plan for Sage Oak Charter School- Keppel

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.
- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

2025-26 Local Control and Accountability Plan for Sage Oak Charter School- Keppel

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
 - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
 - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to EC Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
 - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
 - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Local Control and Accountability Plan (LCAP) Every Student Succeeds Act (ESSA) Federal Addendum Template

School Year

2025-2026

Date of Board Approval

6/18/2025

LEA Name

Sage Oak Charter School- Keppel

CDS Code:

19-64642-0136127

Link to the LCAP:

(optional)

For which ESSA programs apply to your LEA?

Choose From:

TITLE I, PART A

Improving Basic Programs Operated by
State and Local Educational Agencies

TITLE II, PART A

Supporting Effective Instruction

TITLE IV, PART A

Student Support and Academic
Enrichment Grants

(note: This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)

In the following pages, ONLY complete the sections for the corresponding programs.

Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding. LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

The LEA must address the Strategy and Alignment prompts provided on the following page.

Each provision for each program must be addressed unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template**.

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development**. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sage Oak Charter School strategically utilizes federal funds to supplement and enhance local priorities and initiatives funded with state funds, as detailed in our Local Control and Accountability Plan (LCAP). This strategic allocation ensures that federal resources are effectively supporting specific goals within our school community, aligning closely with our broader educational objectives.

Federal funds under Title I, Part A are targeted toward Goal 1 actions aimed at enhancing College and Career Readiness programs. These funds specifically support socioeconomically disadvantaged students by enhancing academic interventions and providing resources that facilitate both college and career readiness. For Goal 2, Title II, Part A funds are allocated to augment professional development programs, including extensive training for educators on differentiated instruction and effective strategies to engage students with diverse learning needs. This ensures that our teaching staff can implement the educational strategies identified in the LCAP effectively. Additionally, under Goal 3, Title IV, Part A funds align with the focus on leveraging technologies to enhance personalized learning pathways. These funds support the integration of advanced technological tools and programs that support a well-rounded education, including enhancing STEM education, supporting arts programs, and providing comprehensive mental health services.

The rationale behind these specific allocations of federal funds is supported by research that shows targeted interventions in areas such as reading and math can close achievement gaps, particularly for low-income students. Studies consistently indicate a strong correlation between teacher qualifications, their ongoing professional development, and student success. This underscores the necessity of equipping teachers with advanced skills and knowledge. Furthermore, engagement in arts and STEM has been linked to higher academic performance and motivation, while robust mental health support is essential for overall student success and well-being.

By ensuring that federal funds are aligned with the specific goals and actions outlined in our LCAP, Sage Oak Charter School maximizes the impact of these resources. This approach not only meets federal and state compliance requirements but also significantly advances our mission to provide a high-quality, equitable, and comprehensive education to all students, fostering both academic excellence and personal growth.

Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sage Oak Charter School ensures the effective alignment of federal funds with activities funded by state and local funds, and where applicable, across different federal grant programs, through a series of strategic efforts:

We engage in an integrated planning and budgeting process that includes stakeholders from all levels of the organization. This collaborative approach ensures that all sources of funding—federal, state, and local—are considered collectively to create a unified resource allocation strategy. This integrated planning is crucial for aligning the objectives across different funding streams and maximizing the impact of each dollar spent.

In addition, we coordinate activities across different federal grant programs, such as Title I, Title II, and Title IV, to leverage synergies and amplify the effects of these funds. By identifying overlapping goals and complementary activities, resources from these programs can be pooled to support broader educational initiatives, enhancing the cohesion and effectiveness of our efforts.

Our decision-making process is strongly data-driven, relying on regular data collection and analysis to assess the effectiveness of funded programs and to adjust strategies as necessary. This allows us to align federal funds closely with the specific needs identified through state and local assessments, ensuring resources are targeted to areas of greatest need.

Stakeholder engagement is also a cornerstone of our approach. By involving a wide range of stakeholders, including parents, teachers, and community members, in the funding decision-making process, we ensure that the allocation of resources reflects the priorities and needs of our school community, thereby increasing the relevance and impact of the funded programs.

Lastly, continuous monitoring and regular reporting on the use and impact of funds ensure transparency and accountability. This not only helps in making necessary adjustments to align the use of federal, state, and local funds effectively but also ensures that activities across different federal grant programs are well-coordinated and directed toward our common educational goals.

Through these efforts, Sage Oak Charter School fosters a strategic and effective use of all funding sources, ensuring that federal funds not only meet regulatory requirements but also significantly enhance our educational initiatives funded by state and local revenues. This strategic alignment supports our overarching goal of providing high-quality, equitable, and comprehensive education to all students

ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

TITLE I, PART A

Monitoring Student Progress Towards Meeting Challenging State Academic Standards

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(1) (A–D)	1, 2, 4, 7, 8 (<i>as applicable</i>)

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

- (A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
- (B) identifying students who may be at risk for academic failure;
- (C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
- (D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

Overuse in Discipline Practices that Remove Students from the Classroom

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(11)	6 (<i>as applicable</i>)

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

Career Technical and Work-based Opportunities

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(12)(A–B)	2, 4, 7 (<i>as applicable</i>)

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

- (A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
- (B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

TITLE II, PART A

Title II, Part A Activities

ESSA SECTION	STATE PRIORITY ALIGNMENT
2102(b)(2)(A)	1, 2, 4 <i>(as applicable)</i>

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

TITLE III, PART A

Parent, Family, and Community Engagement

ESSA SECTION	STATE PRIORITY ALIGNMENT
3116(b)(3)	3, 6 <i>(as applicable)</i>

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

TITLE I, PART A

Poverty Criteria

ESSA SECTION(S)	STATE PRIORITY ALIGNMENT
1112(b)(4)	N/A

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Sage Oak utilizes specific poverty criteria under Section 1113, in compliance with the Every Student Succeeds Act (ESSA) provisions detailed in Title I, Part A. This process is part of our annual reporting through the Consolidated Application and Reporting System (CARS), ensuring transparency and adherence to federal guidelines.

As a nonclassroom-based charter school, we operate as a single LEA. We use the percentage of students eligible for the Household Data Collection (HDC) as our primary poverty criterion. Additionally, we consider other socio-economic indicators such as parental income levels. By combining these data points, Sage Oak can more accurately identify student groups that require additional support, allowing for more targeted resource allocation. This method provides a comprehensive measure of socio-economic disadvantage within our community.

This approach not only helps in directing resources to improve educational equity but also aligns with our broader commitment to providing supportive educational environments for all students, particularly those facing economic challenges. Through careful and systematic analysis of poverty indicators, Sage Oak ensures that federal funding is utilized effectively to enhance educational opportunities and outcomes for our most disadvantaged populations.

ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

TITLE I, PART A

Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDE's website (<https://www.cde.ca.gov/pd/ee/peat.asp>) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
 - a. Number of low-income students
 - b. Number of minority students
2. Does the LEA have an educator equity gap –
 - a. If yes, must create a plan which must include root cause analysis of the disparity
 - b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available [here](#).

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

On November 6, 2019, the SBE approved updated definitions for “ineffective” and “out-of-field” teachers to be included in the amended California ESSA Consolidated State Plan.

Term	Definition
Ineffective teacher	<p>An ineffective teacher is any of the following:</p> <ul style="list-style-type: none"> • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or • A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned) • An individual who holds no credential, permit, or authorization to teach in California. <p>Under this definition, teachers with the following limited emergency permits would be considered ineffective:</p>

	<ul style="list-style-type: none"> • Provisional Internship Permits, • Short-Term Staff Permits • Variable Term Waivers <p>Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record</p>
Out-of-field teacher	<p>A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field:</p> <ul style="list-style-type: none"> • General Education Limited Assignment Permit (GELAP) • Special Education Limited Assignment Permit (SELAP) • Short-Term Waivers • Emergency English Learner or Bilingual Authorization Permits <p>Local Assignment Options (except for those made pursuant to the <i>California Code of Regulations</i>, Title 5, Section 80005[b])</p>
Inexperienced Teacher	A teacher who has two or fewer years of teaching experience.
Minority Student	A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic.
Low-Income Student	A student who is eligible to receive Free or Reduced-Price Meals

Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sage Oak implements effective parent and family engagement through strategic communication and collaborative initiatives under Section 1116. We have established a comprehensive engagement policy, developed with direct input from parents, ensuring that strategies are aligned with the needs and expectations of our school community. This policy guides our efforts to provide parents with clear, accessible information about academic standards, assessments, and student progress, empowering them to support their children's education effectively.

Our approach includes providing resources to help parents understand curriculum demands and enhance their ability to assist with learning activities. We also educate our staff on the importance of parental involvement, training them to engage with families as equal partners in education. Through regular updates and transparent communication, we keep parents informed and involved in school activities, decision-making processes, and the development of support plans for students.

Additionally, Sage Oak integrates parent and family engagement strategies with other federal, state, and local programs to enhance the educational support network available to our students.

To meet this requirement, LEAs must provide a description of the following:

ESSA Section 1112(b)(3): how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans

3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

ESSA Section 1112(b)(7): the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))
6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14)).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Sage Oak is dedicated to enhancing engagement through a comprehensive strategy that ensures the active participation of parents and families in their children's education. Our approach aligns with Section 1116 of ESSA, focusing on creating inclusive, supportive, and informative engagement practices that bridge communication gaps between the school and home environments. This alignment is seamlessly integrated with our LCAP educational partner engagement process, ensuring a unified approach to stakeholder involvement.

We have developed a robust parent and family engagement policy in close collaboration with families, ensuring it reflects their needs and perspectives. This policy is approved by the parent advisory committee and distributed annually emphasizing clarity and comprehensibility. To assist parents in understanding the challenging state academic standards, state and local academic assessments, and other educational requirements, we provide informational sessions that are crucial for empowering them to support their children's academic progress effectively.

At Sage Oak, we prioritize making education accessible and engaging. Our staff is trained to value and integrate parental contributions, working with parents as equal partners in the educational process. Our parent involvement programs are coordinated with other federal, state, and local services, enhancing the resources available to our families.

Through regular updates and proactive communication using various platforms—including emails, our website, and social media—we ensure that all families are well-informed and prepared to participate in school activities and decision-making processes. Our engagement strategies are aligned with our LCAP goals, ensuring that parental input is an integral part of our educational planning and evaluation processes.

In aligning these efforts with our LCAP educational partner engagement process, we ensure that parent and family engagement strategies are integral to our broader educational planning. This involves incorporating parent feedback into LCAP development and review, ensuring that our strategic planning reflects the community's voice and needs. By integrating the requirements of Section 1116 into our LCAP process, we enhance the educational experience for all students and foster a supportive community that is deeply involved in our educational mission. This approach is consistent with Sage Oak's educational model, which emphasizes personalized, flexible learning environments that engage and empower our students and their families.

Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA's schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

At Sage Oak, we are committed to providing a wide array of programs under sections 1114 and 1115 of ESSA, designed to support and enhance the educational experiences of all students, including those who are neglected or delinquent. These programs are tailored to meet the diverse needs of our student population and are implemented with the goal of ensuring every student has access to high-quality education that prepares them for success in college, career, and life.

Our schoolwide programs focus on comprehensive strategies that improve the entire educational program, making them more responsive to the needs of our students, particularly those who are at risk of failing academic standards. These programs integrate various funding sources to support initiatives such as enhanced instructional methods, integrated technology, and expanded professional development for teachers. The overarching goal is to raise the academic achievement of all students by improving the entire school's instructional and operational effectiveness.

For students specifically identified as needing extra academic support, we have targeted assistance programs. These programs provide supplementary educational services to help raise the academic achievement of students at risk of failing. Services include personalized tutoring, intervention programs in reading and math, credit recovery courses, and additional support services tailored to the needs of individual students. These targeted efforts focus on students who are the furthest from meeting the standards the school sets for all children.

If applicable, for children living in local institutions for the neglected or delinquent, Sage Oak will offer educational services designed to address their unique educational and social-emotional needs. These services will include tailored curricula that focus on core academic subjects, life skills education, and social-emotional learning opportunities. We will collaborate with local agencies and institutions to ensure that these students receive a coordinated approach to support that includes academic tutoring, mentoring, and counseling services.

The implementation of these programs is closely monitored to assess their effectiveness in improving educational outcomes. Adjustments are made based on ongoing evaluations and feedback from students, parents, and educational staff. By aligning these initiatives with our LCAP goals, Sage Oak ensures that federal funds are used strategically to supplement and enhance our state-funded initiatives, thereby providing a cohesive and integrated educational experience for all students.

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak Charter School, identifying students most in need of services under the targeted assistance school program outlined in Section 1115 is a collaborative and data-driven process, tailored to our independent study model. This

approach involves a broad spectrum of the school community to ensure that the support provided is comprehensively tailored to the individual needs of each student.

The identification process begins with an analysis of academic performance data, including standardized test results, progress in coursework, teacher evaluations, and other relevant assessments. We also consider factors such as engagement levels in learning activities, progress in personalized learning plans, and any social-emotional assessments to ensure a holistic view of each student's needs.

Teachers and school leaders work in consultation with parents, administrators, and specialized instructional support personnel to review and discuss the data collected. This collaborative dialogue is crucial as it helps integrate insights from various perspectives, particularly from parents who provide vital information about their child's learning environment and any external factors influencing their educational experience.

The team prioritizes students based on the urgency and severity of their needs. The criteria for this prioritization include the extent of academic challenges, the potential impact of additional support on the student's educational outcomes, and the capacity of our resources to effectively address these needs.

This collaborative and data-informed approach ensures that the targeted assistance provided is directly responsive to the most pressing needs of our students. By maintaining regular communication and strategic meetings with all stakeholders involved, Sage Oak sustains a dynamic and adaptable support system that enhances educational outcomes and overall student well-being in a non-classroom based setting.

Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we are committed to supporting the educational needs of homeless children and youth through a comprehensive approach that aligns with the McKinney-Vento Homeless Assistance Act. Our strategy ensures that these students have equal access to educational opportunities and are supported in their enrollment, attendance, and academic success.

To address the challenges faced by homeless students, Sage Oak provides specific services designed to remove barriers to their education. This includes ensuring immediate enrollment even when students do not have access to required documents typically necessary for school entry. We provide assistance with obtaining academic and medical records, and we offer school supplies and materials at no cost to the families. We also reserve a portion of our federal funds under Section 1113(c)(3)(A) to support additional services tailored to the needs of homeless students.

In collaboration with services provided under the McKinney-Vento Act, our school appoints a liaison for homeless students to help coordinate these efforts. This liaison works directly with students and families to identify their specific needs and connect them with available resources. They also work with school staff to raise awareness about the challenges faced by homeless students and to train staff on how to best support these students in an educational setting.

Through these coordinated efforts, Sage Oak Charter School strives to create a supportive environment that mitigates the impact of homelessness on students' education, ensuring that all students have the opportunity to succeed and thrive academically.

Student Transitions

ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

N/A

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

- (A) through coordination with institutions of higher education, employers, and other local partners; and
- (B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we recognize the importance of smooth transitions for students moving from middle grades to high school and from high school to postsecondary education. Our strategies are designed to support these critical transitions, ensuring that our students are well-prepared for each new phase of their educational journey.

Key to facilitating the transition from middle grades to high school, Sage Oak ensures our curriculum aligns with the latest academic standards and opportunities. Additionally, we engage with local employers and community partners to provide students with relevant insights into various career paths and the skills required in the workforce, enriching our curriculum with practical applications and real-world relevance.

For students transitioning from high school to postsecondary education or careers, Sage Oak offers robust programs designed to enhance college and career readiness. This includes increased access to early college high school programs, dual or concurrent enrollment opportunities, and comprehensive career counseling services. Our educational advisors play a crucial role in this process, working individually with students to create personalized learning plans that reflect their academic and career goals. These plans are instrumental in navigating course selections, extracurricular activities, and appropriate early college opportunities, tailored to each student's unique interests and skills. Additionally, we are actively increasing our Career and Technical Education (CTE) pathways to include new areas such as Child Development, Sports Medicine, and Arts, Media, and Entertainment (AME), offering students practical and varied career training options that align with their personal interests and market demands. We maintain up-to-date knowledge of University of California (UC) and California State University (CSU) requirements, as well as offerings at community colleges, to guide our students effectively through their educational pathways.

In addition to these transition strategies, our commitment under LCAP Action 1:4 involves developing unified articulation processes that seamlessly transition students through each grade band. This includes integrating critical feedback from graduates and their families to enhance the continuity and relevance of our curriculum, further ensuring our students are prepared for the expectations and challenges of their subsequent educational stages.

Sage Oak's proactive approach ensures that our students are not only aware of their postsecondary options but are also equipped to make informed decisions about their futures. By staying abreast of the latest educational requirements and offerings and implementing these strategies in coordination with higher education institutions, employers, and local partners, we prepare our students to successfully navigate the transitions between educational stages, fully equipped with the knowledge, skills, and qualifications needed to thrive in their chosen paths.

Additional Information Regarding Use of Funds Under this Part

ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

- (A) assist schools in identifying and serving gifted and talented students; and
- (B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

TITLE I, PART D

Description of Program ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

THIS ESSA PROVISION IS ADDRESSED BELOW:

Formal Agreements ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the

- (A) LEA; and
- (B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Comparable Education Program ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Successful Transitions ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Educational Needs ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children

and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Social, Health, and Other Services

ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Postsecondary and Workforce Partnerships

ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Parent and Family Involvement

ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Program Coordination

ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Probation Officer Coordination

ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Individualized Education Program Awareness

ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Alternative Placements

ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE II, PART A

Professional Growth and Improvement

ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

At Sage Oak, our professional development strategy is crafted to support educators at every stage of their careers, ensuring they are well-prepared to meet the diverse needs of our student body. This strategy begins with induction for new teachers and extends through ongoing development opportunities, including participation in professional development conferences such as those provided by the California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC).

We also broaden our educators' training with specialized sessions such as AVID training to bolster college readiness and the UC conference to align with university standards. Also, our staff partakes in targeted professional development focused on special education, ensuring that they are proficient in the latest methodologies and practices.

Our efforts are further supported by Professional Learning Communities (PLCs) which foster collaborative learning and data-driven decision-making. This collaborative environment allows educators to share insights and strategies, enhancing educational practices. Live instruction training is another critical component of our professional development program, ensuring that our educators are proficient in engaging students effectively in a dynamic and increasingly digital learning environment.

In addition, we provide leadership development opportunities for advancement pathways, ensuring a continuous cycle of professional growth and leadership within our school community.

We continually assess the effectiveness of our professional development programs through regular feedback, allowing us to align our strategies closely with both our educational goals and the evolving needs of the school. This comprehensive approach not only supports the professional growth of our educators but also enhances the overall educational experience for our students, ensuring that every member of our school community is equipped to thrive in an ever-changing educational landscape.

Prioritizing Funding

ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

Address these questions:

1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.

2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

Data and Ongoing Consultation to Support Continuous Improvement

ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.
3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
 - a. Teachers
 - b. Principals and other school leaders
 - c. Paraprofessionals (including organizations representing such individuals)
 - d. Specialized instructional support personnel
 - e. Charter school leaders (in a local educational agency that has charter schools)
 - f. Parents
 - g. Community partners
 - h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

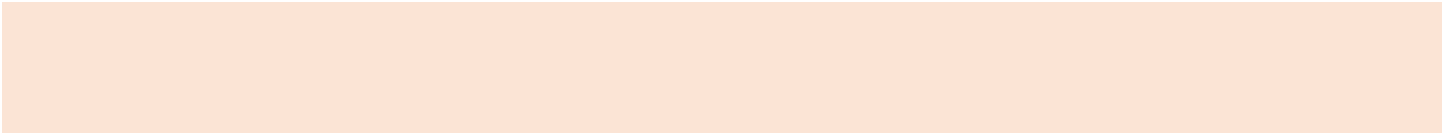
At Sage Oak, our approach to continuous improvement under Title II, Part A, revolves around a robust system of data analysis and ongoing consultation. We integrate Title II activities with our broader educational strategies, ensuring alignment with our holistic educational goals, such as those outlined in our Local Control and Accountability Plan (LCAP).

We employ a data-driven approach to monitor and refine professional development activities. This includes regular analysis of student performance data, staff feedback on professional development sessions, and other relevant metrics. Our Professional Learning Communities (PLCs) play a crucial role here, enabling educators to discuss and implement strategies based on data insights.

Sage Oak conducts evaluations of Title II, Part A activities throughout the academic year. This regular monitoring allows us to stay responsive to the needs of our educators and students, adapting our strategies to maximize effectiveness.

Our consultation process is inclusive, involving a wide range of stakeholders. We engage with teachers, principals, specialized instructional support personnel, and charter school leaders to ensure diverse perspectives are considered. Community partners and organizations with relevant expertise are also involved, enriching our professional development programs.

By systematically integrating feedback and data into our professional development initiatives, Sage Oak Charter School ensures that our educational practices are not only aligned with current needs but are also poised for future success, fulfilling our commitment to continuous improvement.



TITLE III, PART A

Title III Professional Development

ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Enhanced Instructional Opportunities

ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Title III Programs and Activities

ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:

1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
 - are focused on English learners and consistent with the purposes of Title III;
 - enhance the core program; and
 - are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

- (A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
- (B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE IV, PART A

Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

- (A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
- (B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
- (C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
- (D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
- (E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than \$30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

- 1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
- 2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
- 3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
 - a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, our utilization of Title IV, Part A funds is closely aligned with LCAP Goal 3, which focuses on enhancing our technological capabilities to support personalized learning and operational efficiency. We invest in innovative educational technologies, including the development and integration of AI-driven tools. These technologies are designed to tailor learning experiences to individual student needs and streamline administrative processes, thereby enhancing educational outcomes and operational efficacy.

Our objective with these funds is to not only integrate cutting-edge technology into our curriculum but also to ensure these tools effectively support our educational goals. We periodically evaluate the effectiveness of these technological interventions by analyzing student engagement metrics, academic performance data, and operational efficiency indicators. This ongoing assessment helps us refine our technology strategy to ensure it remains aligned with the evolving needs of our students and the broader educational landscape, maintaining our commitment to providing a high-quality, future-ready education.

Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least \$30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for a well-rounded education?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for safety and health of students?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at <https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp>.

Date of LEA's last conducted needs assessment:

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: <https://www.cde.ca.gov/sp/st/>

California Department of Education
February 2022



LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- South

CDS Code: 37-75416-0139378

School Year: 2025-26

LEA contact information:

Krista Woodgrift

Superintendent

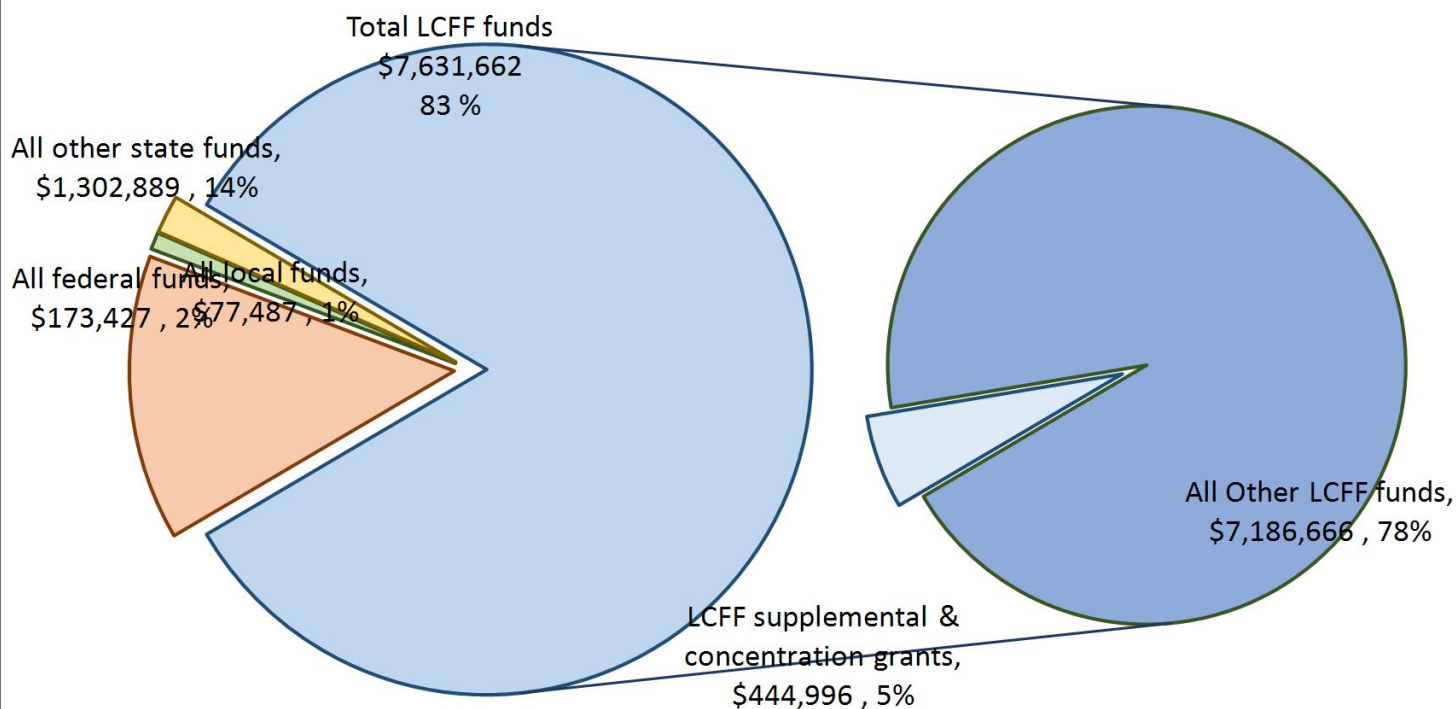
kwoodgrift@sageoak.education

888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2025-26 School Year

Projected Revenue by Fund Source

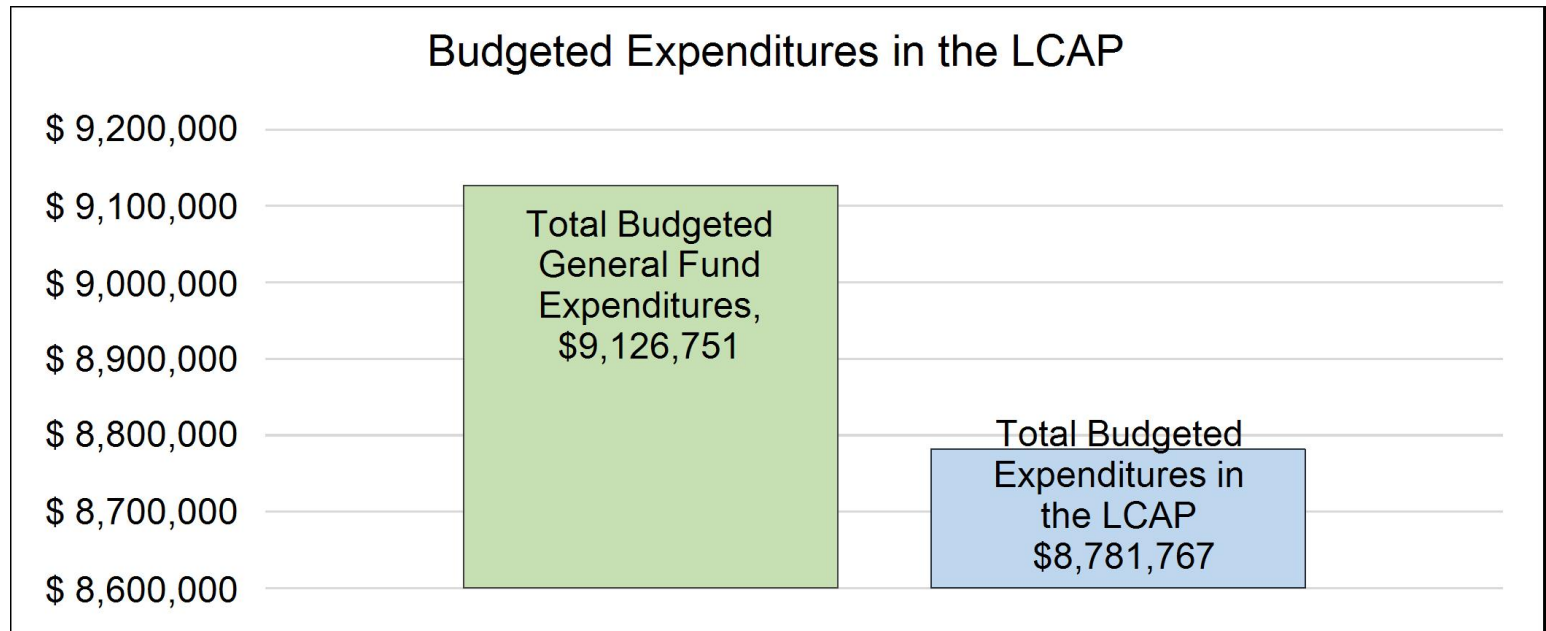


This chart shows the total general purpose revenue Sage Oak Charter School- South expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School-South is \$9,185,465, of which \$7,631,662 is Local Control Funding Formula (LCFF), \$1,302,889 is other state funds, \$77,487 is local funds, and \$173,427 is federal funds. Of the \$7,631,662 in LCFF Funds, \$444,996 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- South plans to spend for 2025-26. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- South plans to spend \$9,126,751 for the 2025-26 school year. Of that amount, \$8,781,767 is tied to actions/services in the LCAP and \$344,984 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Expenditures not included in the LCAP are non related to the educational program, such as legal, accounting systems, and certain lease expenditures.

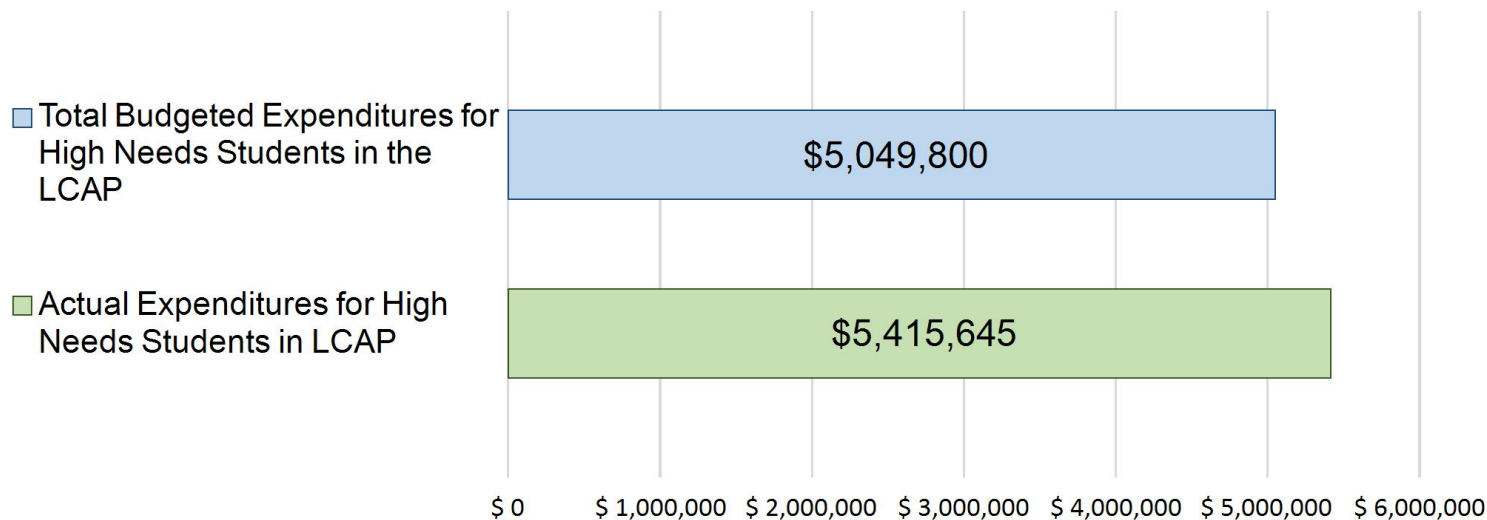
Increased or Improved Services for High Needs Students in the LCAP for the 2025-26 School Year

In 2025-26, Sage Oak Charter School- South is projecting it will receive \$444,996 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- South must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- South plans to spend \$6,365,943 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2024-25

Prior Year Expenditures: Increased or Improved Services for High Needs Students



This chart compares what Sage Oak Charter School- South budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- South estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2024-25, Sage Oak Charter School- South's LCAP budgeted \$5,049,800 for planned actions to increase or improve services for high needs students. Sage Oak Charter School- South actually spent \$5,415,645 for actions to increase or improve services for high needs students in 2024-25.

The difference between the budgeted and actual expenditures of \$365,845 had the following impact on Sage Oak Charter School- South's ability to increase or improve services for high needs students:



Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sage Oak Charter School- South	Krista Woodgrift Superintendent	kwoodgrift@sageoak.education 888-435-4445

Plan Summary [2025-26]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Sage Oak Charter School educates students through a personalized and collaborative learning approach, offering students from transitional kindergarten through 12th grade an empowering education designed to prepare them for purposeful and productive lives. At Sage Oak, we cherish the individuality of each student, inspiring them to leverage their unique potential and contribute positively to their communities. Our commitment to our students is encapsulated in our core values: Service, Accountability, Growth Mindset, and Excellence, which guide our educational approach and community interactions.

Operating across a diverse geographical region that includes San Diego, Imperial, Orange, and Riverside counties, Sage Oak offers a unique balance of flexibility, accountability, and academic excellence. Our educational model emphasizes the importance of partnership between educators and families, ensuring that each student's personal academic goals are achieved through a tailored educational experience.

Sage Oak is dedicated to harnessing the power of flexible learning environments and advanced educational technologies to cater to a wide range of learners. Our approach is characterized by personalized learning pathways that accommodate students' diverse backgrounds and aspirations, providing them with a stimulating and supportive alternative to traditional education models. Through the integration of a varied curriculum, individualized support, and high academic standards, Sage Oak fosters an environment where students are encouraged to become self-motivated, competent, lifelong learners poised to make a meaningful impact in their communities.

Our educational philosophy prioritizes the development of open, curious, and alert minds, preparing students to thrive in any learning situation. By offering the flexibility to learn anytime and anywhere, combined with adaptable teaching and curricular models, Sage Oak

empowers students to take ownership of their education. This approach equips them with not only the necessary knowledge and skills but also the confidence, creativity, and resourcefulness to navigate the challenges and opportunities of the 21st century.

As of the most recent data reporting period, Sage Oak serves a vibrant and diverse student body, with enrollment reflecting a broad spectrum of cultural and socio-economic backgrounds. Our commitment to inclusivity and excellence is evident in our dedicated staff, innovative programs, and the supportive community that makes Sage Oak a leader in personalized education.

Based on the Fall 1 Census data reporting on October 1, 2025, to be reported on the California Dashboard, there were 583 students enrolled. Of these enrollments, 89 were identified as Title I students. Other student groups are as follows: 36.36% are classified as Socioeconomically Disadvantaged (SED). Students with Disabilities (SWD) make up 9.09% of the population, and English Learners (EL) make up 1.89%. The ethnic diversity of Sage Oak includes students who are White (40.5%), Hispanic (42.4%), Two or More Races (8.2%), Asian (2.2%), African American (5.0%), Filipino (.7%), American Indian/Alaskan Native (.5%), and Native Hawaiian/Other Pacific Islander (.3%).

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflecting on Sage Oak's annual performance via the California School Dashboard and local data reveals both triumphs and areas for growth. We perform above the state in all indicators, highlighting our strong academic program. Our achievements are underscored by high graduation rates and college and career readiness, along with very low rates in chronic absenteeism, suspension, and expulsion, indicating a supportive and engaged school environment. However, challenges persist in academic performance for Students with Disabilities (SWD) and Socio-economically Disadvantaged (SED) student groups, with Math for SWD highlighted as a critical focus area. Recognizing the lack of sufficient data for English Learners (EL), Homeless, and Foster student groups due to their small numbers, our focus will also encompass enhancing the overall academic foundation and addressing the gaps identified.

California School Dashboard Analysis

ELA Distance from Standard (DFS):

Overall : +5.5 (Medium)

EL: n/a- not enough students

SWD: -59.3 (Low)

SED: -33.8(Low)

Math DFS:

Overall: -29 (Low)

EL: n/a- not enough students

SWD: -64.4 (Low)

SED: -59.7 (Low)

Chronic Absenteeism: .3% (Very Low)

Graduation Rate: 95.8% (Very High)

Suspension: 0% (Very Low)

Expulsion: 0% (Very Low)

College and Career Readiness: 60.9% (High)

EL Progress (ELPI): n/a- not enough students

iReady Local Assessment Analysis

ELA (on or above grade level):

Overall : 64%

EL: n/a- not enough students

SWD: 40%

SED: 52%

Homeless: n/a- not enough students

Foster: n/a- not enough students

Math (on or above grade level):

Overall: 56%

EL: n/a- not enough students

SWD: 29%

SED: 46%

Homeless: n/a- not enough students

Foster: n/a- not enough students

Our strategic response, aligned with our LCAP goals, not only focuses on targeted interventions, the expansion of professional development opportunities, and the integration of advanced technologies and personalized learning pathways but also emphasizes enhancing college and career readiness pathways. This holistic approach is designed to elevate educational outcomes, ensuring all students, particularly those needing extra support, achieve their fullest potential and are well-prepared for their future careers and academic endeavors.

Learning Recovery and Emergency Block Grant (LREBG)

Sage Oak has unexpended LREBG funds for the 2025-26 school year. LREBG funded actions may be found in Goal 1, Action 2 and Goal 2, Action 4. A review of state and local data, and engagement feedback indicates a need to support our intervention and counseling programs for qualifying students, ensuring small teacher to student ratios and addressing the needs to engage students of all student groups. Sage Oak has strategically invested in expanding staff supports using the LREBG. This action aligns to allowable uses of funds in the area of staff

hiring and development to elevate our intervention programs and resources to all students in both English Language Arts and Mathematics small group instruction. See action descriptions for more.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

n/a

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

n/a

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

n/a

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

n/a

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parent Advisory Committee	The Parent Advisory Committee played a pivotal role in shaping the Local Control and Accountability Plan (LCAP), engaging in key meetings on 9/5/24, 10/3/24, 12/5/24, 1/10/25, 3/6/25, 5/1/25.. Additionally, the Parent Advisory Committee also met with our Board on 3/4/25, sharing their contributions and increasing their valuable influence. They provided valuable insights, focusing on enhancing curriculum options and advocating for educational approaches tailored to diverse student needs. Key areas of emphasis included promoting experiential learning, fostering strong teacher-student relationships, and integrating physical and social activities for comprehensive student development. The committee also highlighted the importance of engaging non-English speaking families and utilizing AI and technology to complement traditional teaching methods. Their contributions were instrumental in formulating strategies that support college and career readiness, reinforce the Multi-Tiered System of Supports (MTSS), and advocate for continuous teacher and staff development.
Student Advisory Committee	The Student Advisory Committee was a newly formed committee this year. The student-led committee met four times this school year. They met on 9/6/24, 12/5/24, 1/10/25, and 5/2/25. They played a unique role in contributing to the Local Control and Accountability Plan emphasizing student voice and improving student input on feedback campaigns. They contributed to staff professional learning communities and had a key role in the Spring when connecting with teachers in ways to share input and influence future decisions.

Educational Partner(s)	Process for Engagement
Parents, Students, Teachers, Staff	In the development of the Local Control and Accountability Plan (LCAP), a comprehensive approach was employed to engage parents, staff, and students, ensuring their voices were integral to the plan. This inclusive process utilized various survey platforms, such as Parsec Reals survey platform, to gather in-depth feedback including an AI-led interview regarding parent input. "Question of the Month" surveys were instrumental in capturing ongoing input, while educational partner surveys provided broader insights into the needs and perspectives of the school community. Additionally, climate surveys were conducted to understand the overall environment and satisfaction levels within the educational setting. This multifaceted engagement strategy ensured a diverse range of feedback, which was crucial in shaping a well-rounded and effective LCAP.
Principals, Leadership, Administrators	In shaping the Local Control and Accountability Plan (LCAP), principals, the leadership team, and administrators were essential participants, engaging in strategic initiatives to ensure comprehensive development. Through regular "Question of the Month" surveys, invaluable staff feedback was gathered, providing crucial insights for informed planning. During pivotal meetings on 7/31/24, 8/28/24, 9/18/24, 10/9/24, 1/22/25, 3/5/25, and 4/16/25 the leadership team conducted both half-day and full-day sessions focused on a detailed examination of the school's specific needs, thorough analysis of student achievement data, evaluation of feedback from educational partners, developing and analyzing the annual strategic plan as it impacts the LCAP, and an in-depth assessment of LCFF priorities. These sessions were critical in aligning the LCAP with the school's broader objectives, ensuring the plan is both responsive and robust in addressing the diverse needs of the student body. This methodical and collaborative approach guaranteed a well-structured and effective LCAP, poised to enhance every student's educational experience.
Title 1 Parents/Guardians	In the development of the Local Control and Accountability Plan (LCAP), Sage Oak Charter Schools prioritized meaningful engagement with Title I parents and guardians through a multi-faceted approach grounded in its Parent and Family Engagement Policy. One key initiative included the annual Title I Parent/Guardian Information Meetings, held virtually to ensure accessibility. These meetings provided a platform for two-way communication, enabling

Educational Partner(s)	Process for Engagement
	<p>families to gain important insights into the Title I programs and offer valuable feedback on school strategies and student needs. Sage Oak offers a flexible range of engagement opportunities—including recorded sessions, parent/guardian webinars, and a school-parent compact that seeks feedback from families—which collectively foster an inclusive and supportive school culture. Through consistent communication, such as personalized emails, the weekly Sage News, and outreach to families of Title I students, Sage Oak ensures parents stay informed and empowered to contribute to their child's educational journey. These strategies reflect Sage Oak's commitment to building strong partnerships with families, affirming that their voices are not only heard but are instrumental in shaping educational priorities, enhancing academic outcomes, and fostering student success.</p>
Community Partners	<p>In the development of the Local Control and Accountability Plan (LCAP), the school's partnership with Parsec Education marked a significant enhancement in strategic planning and program evaluation. Parsec Education's expertise was particularly instrumental in developing 'Street Data Metrics,' a set of advanced, nuanced measures designed to provide a deeper understanding of educational impact and student outcomes. This collaboration represents a commitment to incorporating expert external insights and data-driven methodologies into the LCAP. The involvement of Parsec Education not only introduced innovative perspectives to the planning process but also ensured that the evaluation of programs was thorough and reflective of real-world educational scenarios. This partnership, especially in the development of these tailored 'Street Data Metrics,' underscores the school's dedication to employing comprehensive, expert-driven strategies to achieve its educational goals and enhance the overall learning experience.</p>

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The adopted Local Control and Accountability Plan (LCAP) for Sage Oak Charter School is a direct reflection of the school's robust commitment to inclusive, data-informed decision-making and deep educational partner engagement. Sage Oak's approach is grounded in its Parent and Family Engagement Policy, which outlines a comprehensive framework for involving Title I families and the broader school community in shaping school priorities. Through a blend of community partner surveys, parent/guardian webinars, and advisory councils

such as the Parent Advisory Committee (PAC), and Student Advisory Committee (STAC), Sage Oak ensures that all voices—especially those of high-needs student groups—inform the development and refinement of school policies and practices.

This year's LCAP development process was notably shaped by consistent input, reflecting the charter network's commitment to equity, even amidst differing student populations and geographic locations. The PAC and STAC emphasized the importance of improved onboarding for new students, particularly English Language Learners, to help them adapt to the school's independent learning model. They also advocated for enhanced math instruction through engaging formats, increased tutoring options, and more age-appropriate survey tools.

Consistent with Sage Oak's policy, an annual evaluation of parent engagement practices and barriers to participation is conducted, with findings used to update and improve programs. This evidence-based cycle allows for the alignment of initiatives such as college and career readiness, the Multi-Tiered System of Supports (MTSS), and continuous professional development for staff—especially in live, synchronous instruction. Surveys collected through the Parsec Reals platform revealed high satisfaction with Sage Oak's learning environment, safety, and student achievement—often exceeding state benchmarks—while also identifying key areas for growth. Broad staff participation in the LCAP surveys support deep strategic alignment and instructional and leadership development are supported by reflective practices across teams. These Reals assist in building leadership capacity and improving satisfaction. Parent, student, and staff engagement is a clear strength for Sage Oak revealing meaningful engagement across events, academic programs, and formats, including asynchronous and synchronous learning. Student and family voices inform decisions around programming, engagement, and assessment experience. Advisory councils recommended promoting feedback campaigns more proactively and introducing parent chat groups for real-time collaboration. Ultimately, Sage Oak's LCAP reflects a collaborative, transparent, and evolving strategy designed to meet the diverse needs of its learners. Through intentional and recurring engagement with families and staff, Sage Oak continues to position itself as a leader in personalized, inclusive education—preparing all students, especially those with the greatest needs, to thrive academically and personally.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	<p>Student Outcomes: Academic Achievement and College and Career Readiness</p> <p>To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.</p>	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

At the heart of this goal lies a commitment to holistic education. Through its standout programs, Sage Oak not only offers an excellent academic foundation but also fosters a love for learning and a commitment to serving the community. These programs are designed to be immersive, innovative, and integrated, ensuring that every student gets a chance to shine and find their passion. Whether it's through advanced academic curricula, extracurricular activities, or real-world application projects, the objective is clear: to produce graduates who are not only academically adept but also critical thinkers, problem solvers, and community leaders.

At Sage Oak, our commitment to data informed practices drives our focus on tangible academic achievements and readiness. Currently, 57% of our high school students have completed A-G requirements. With that and only a small number of students completing CTE pathways, our strategies include enhancing college and career readiness support through high school counselors and the development of additional CTE pathways. Sage Oak also specifically tailors its educational approach to support socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. For our socio-economically disadvantaged students and students with disabilities, CAASPP scores and iReady growth show a need for improvement. In addition, since 33% of students with disabilities are 2 or more grade levels below in iReady Math, dropping from our baseline percentage, our efforts are geared towards ensuring all students reach their fullest

potential. With the further development of our AVID program and increasing participation in synchronous instruction, professional development opportunities and a specific focus on supporting our LTELs and students qualifying for intervention, we aim to lift these scores. By embedding education within immersive, innovative, and integrated programs, and utilizing Learning Recovery Emergency Block Grant (LREBG) funds with increased staffing, this goal directly supports all students, enhancing their academic proficiency, critical thinking, college and career readiness, and leadership skills. This inclusive strategy demonstrates Sage Oak's commitment to equitable, high-quality educational opportunities, ensuring all students have the resources and support needed to succeed.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	Completion of A-G Requirements: % of students successfully completing the A-G requirements	58.3% Source: Dataquest 22-23	56.5%		63.3%	-1.8%
1.2	Career Technical Education (CTE) Pathway Completion # of students completing CTE pathways	1 student Source: Dataquest 22-23	0 students		6 students	-1 student
1.3	Percentage of Students Achieving a Score of 3 or Higher on AP Exams	100% Source: College Board 22-23	100%		70% or higher	30%
1.4	College and Career Indicator (CCI) Performance	66.7% Source: CA Dashboard 22-23	60.9%		72%	-5.8%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of students considered college and career prepared according to the CA Dashboard					
1.5	Graduation Rate Maintenance % of graduated students on the CA Dashboard	83.3% Source: CA Dashboard 22-23	95.8%		90%	12.5%
1.6	Maintenance of Low Middle School Dropout Rates # of middle school dropouts	0% Source: Internal 22-23	0%		0%	0
1.7	Maintenance of Low High School Dropout Rates % of high school dropouts according to DataQuest cohorts	0% Source: Dataquest 22-23	4.35% (1 student)		less than 2%	4.35%
1.8	Expansion of K-8 Live Synchronous Instruction Courses Aligned with CTE Pathways	79 course offerings Source: Internal 22-23	198 course offerings		200 course offerings	119

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	# of K-8 synchronous course offerings that align with the CTE pathways					
1.9	Performance in iReady Assessments for ELA and Math % of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics	Math- 55% ELA- 63% Source: i-Ready Spring 23-24	Math- 56% ELA- 65%		Math- 58% ELA- 66%	Math- 1% ELA- 2%
1.10	California Assessment of Student Performance and Progress (CAASPP) Achievement % of students who have met or exceeded standards in CAASPP assessments for English Language Arts (ELA) and Mathematics	Math- 37.18% ELA- 55.49% Source: Dataquest 22-23	Math -36.22% ELA -54.05%		Math- 41% ELA- 58%	Math-.3% ELA -4.79%
1.11	CAASPP Performance for Socio-Economically Disadvantaged (SED) Students	Math- 32.69% ELA- 40% Source: Dataquest 22-23	Math -21.88% ELA-42.19%		Math- 35% ELA- 43%	Math -.44% ELA 2.19%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of socio-economically disadvantaged students meeting or exceeding CAASPP standards in English Language Arts (ELA) and Mathematics					
1.12	Accessibility to Instructional Materials % of students with full access to necessary instructional materials	100% Source: SARC 23-24	100%		100%	0
1.13	Alignment with State Standards % of students whose education is fully aligned with state standards	100% Source: SARC 23-24	100%		100%	0
1.14	Community Belief in Robust Curriculum % of parents, students, and staff who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level	Parents- 99% Students- 98% Staff- 99% Source: Internal 23-24	Parents - 99% Students - 94% Staff -94%		Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 0% Students -4% Staff -5%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	standards in core content areas.					
1.15	<p>Growth in ELA and Math Among Intervention Students</p> <p>% of students receiving interventions who demonstrate growth equivalent to one year or more in English Language Arts (ELA) and Mathematics</p>	<p>Math- 48%</p> <p>ELA- 33%</p> <p>Source: Internal 22-23</p>	<p>Math - 67%</p> <p>ELA - 58%</p>		<p>Math- 53%</p> <p>ELA- 38%</p>	<p>Math 19%</p> <p>ELA 25%</p>
1.16	<p>Increased Participation Rate in Math Interventions for Students with Disabilities (SWD)</p> <p># of SWD participating in math intervention programs</p>	<p>40%</p> <p>Source: Internal 23-24</p>	49%		60%	9%
1.17	<p>Increased iReady Math Achievement for Students with Disabilities (SWD)</p> <p>Decrease % of SWD moving out of Tier 3 in iReady math assessments</p>	<p>47%</p> <p>Source: i-Ready 22-23</p>	33%		44%	14%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.18	Improved CAASPP Performance for SWD in Math Achievement Increase in DFS in Math for SWD 3 points annually	-86.8 DFS Source: CA Dashboard 22-23	-64.6 DFS		-77 DFS	22.4
1.19	Increased Teacher Preparedness for Student Articulation % of teachers who feel equipped to effectively prepare and transition their students to the next grade level band	78% Source: Internal 22-23	98%		90% or higher	20%

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Academic Achievement and College & Career Readiness

Sage Oak Charter School made meaningful progress in the implementation of Goal 1 initiatives, aimed at improving academic performance and expanding access to college and career readiness (CCR) pathways. Grounded in the strategic plan, the year's implementation focused on personalized instruction, increased course access, and targeted support for high-need student groups including English Learners (ELs), Long-Term English Learners (LTELs), Students with Disabilities (SWD), and Socioeconomically Disadvantaged (SED) students.

Planned vs. Actual Implementation:

Planned actions included the expansion of Career and Technical Education (CTE) pathways, AVID 9/10 integration, A-G counseling supports, increased synchronous instruction, and improved tiered interventions. While many of these initiatives were implemented as intended, a few require strategic adjustments or are still in development.

For example, the AVID 9/10 elective was successfully piloted and fully implemented this year. Additionally, Sage Oak's Oakschool program—a name used for its live, synchronous course offerings—received positive feedback from students. Oakschool provides a wide range of real-time, teacher-led classes in both core subjects and enrichment areas for students in grades TK–12. Notably, the number of CTE-aligned Oakschool offerings grew significantly, increasing from 79 to 198 courses by the end of the year. This expansion places the school on track to meet its goal of 200 synchronous courses by 2026.

In terms of A-G completion, Sage Oak saw a slight dip in completion, but improvements are planned that will strengthen academic counseling and intentional alignment of coursework with university entrance requirements.

At Sage Oak South, two AP exams were attempted and both were passed, maintaining a 100% pass rate for the second consecutive year. While this continued success reflects strong student support and effective course preparation, the number of AP participants remains low. Expanding access to AP coursework and increasing student awareness of available advanced academic options will be critical for the next LCAP cycle. South will benefit from ongoing efforts to become an official AP testing site and from enhanced academic counseling aimed at identifying students ready for college-level challenges.

In the area of CTE pathway completion, data showed low overall completion numbers. However, this metric does not fully capture the school's CTE engagement and progress and enrollments continue to increase in our current five pathways.. Each new pathway (e.g., Entrepreneurship, Computer Science, Sports Medicine) is piloted for one year to assess student interest before full implementation. Because these are multi-year programs, students who transfer or graduate early are recorded as non-completers—even when they pursue the same career field elsewhere.

To address this, Sage Oak has begun developing fully built-out internal CTE pathways, including in-house capstone projects that enable students to complete the entire sequence without relying on external options. In 2024–25, Sage Oak also piloted a Computer Science internship, and plans to expand next year with the addition of a Child Development internship in the VLA TK class. These steps reflect a deepening commitment to hands-on, career-connected learning that is accessible and sustainable within Sage Oak's instructional model. On the academic achievement side, iReady diagnostic data at South demonstrated steady improvement, with gains particularly evident among students receiving intervention support. In Spring 2024, iReady Math scores increased from 55% to 56%, and ELA scores rose from 63% to 65% of students achieving at or above grade level compared to the baseline year. Through funding from the Learning Recovery Emergency Block Grant (LREBG), Sage Oak added intervention teachers who enhanced Tier 2 and Tier 3 support by delivering data-informed small group instruction, collaborating with general education staff, and tracking student progress over time. These supports contributed to notable improvements in intervention outcomes, with 67% of intervention students achieving one year or more of growth in math, and 58% in ELA. These results suggest that intervention strategies are yielding strong outcomes in math, especially for SWD, though continued focus is needed to strengthen literacy gains and address subgroup disparities.

Successes:

Personalized and Synchronous Instruction Expansion:

Sage Oak grew from 79 to 198 synchronous CTE-aligned offerings, diversifying learning pathways and increasing access to high-interest content across K–8.

A-G Completion Growth:

Significant gains in A-G completion demonstrate success in improving academic planning and access to college-prep coursework.

Math Intervention Expansion (iReady):

Intervention staffing funded through LREBG grants supported stronger performance among students receiving targeted math and ELA interventions. Growth was particularly seen among students moving out of Tier 3.

Educational Partner Engagement:

Stakeholder feedback from surveys and advisory groups reflected high levels of satisfaction with access to challenging curriculum, college and career readiness, diverse course offerings, and personalized academic support. Parents, students, and staff also expressed confidence in the support provided for English learners, noting that a range of targeted resources has positively influenced their academic achievement. In addition, Sage Oak teachers reported high satisfaction with professional development specifically designed to help them prepare students for the expectations and standards of the next grade level, reinforcing the school's commitment to instructional alignment and continuous improvement.

Challenges:

Persistent Achievement Gaps:

At Sage Oak South, achievement gaps remain a concern, particularly for Students with Disabilities (SWD) and Socioeconomically Disadvantaged (SED) students in mathematics. On the CAASPP, SWD students improved their Math Distance from Standard (DFS) of -86.8 to -64.4, but only 10% of SWD students scored at or above grade level on the iReady Math assessment. SED students' CAASPP math performance dropped from 32.68% achieving meeting or exceeding to 21.88%, indicating ongoing academic gaps. Although the school has implemented interventions and personalized support structures, these figures underscore the need for continued intensive, data-informed strategies to address persistent gaps and accelerate progress for SWD and SED student groups.

CTE Pathway Completion Tracking:

While participation is growing, multi-year structure, student transfers, and absence of internal capstones contributed to low recorded completion rates. Continued investment in internal pathway design and internship partnerships is a priority.

AP Participation Barriers:

The absence of a centralized testing site has created access challenges, impacting both participation and performance. This improvement for year 2 is expected to provide a more supportive testing environment and boost future participation and performance.

College & Career Indicator (CCI) Gains:

CCI rates dropped from 66.7% to 60.9% highlighting a need for supporting expanded course access, academic counseling, and pathway clarity.

Conclusion and Next Steps:

Sage Oak demonstrated strong intent and partial success in implementing Goal 1. Gains in A-G completion, synchronous learning, and intervention support were offset by slower growth in CTE completions, achievement gaps, and AP outcomes. As the school enters Year 2 of the LCAP cycle, action plans are being refined to:

Expand internal CTE capstone options and internships;

Become an official AP testing site;

Increase professional development for EL and math instruction;

Intensify Tiered supports for students with the greatest need.

Ongoing community input, use of real-time data, and strategic design will ensure implementation evolves to meet the needs of all learners—preparing every student for college, career, and life success.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 1.3 related to increased expenditures for math materials. The school also spent less for action 1.2 related to budgeted but unfilled positions.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The actions undertaken to support Goal 1 have yielded a range of outcomes, with areas of clear growth alongside others requiring further strategic attention. The overall focus on enhancing personalized learning, college and career readiness (CCR), and equitable academic support, especially for historically underserved student groups, has set a strong foundation. However, key metrics indicate the need to adjust and intensify implementation in certain areas, including for English Learners (ELs), Students with Disabilities (SWD), and students pursuing AP exams and CTE pathways.

College and Career Readiness – Emerging Effectiveness

In increasing College and Career Indication performance, the school's progress took a slight dip, dropping to 61%. However, expanded course offerings, synchronous instruction, and improved counseling supports are already in place for improvement. CTE pathway completion remains low, and A-G completion growth has been incremental. The slower pace of growth is largely attributed to student preference for non-A-G options and delayed implementation of internal capstone courses in CTE programs.

Career Technical Education (CTE) Pathway Completion – Emerging Effectiveness with Accessibility Gains

The CTE pathway completion metric is designed to reflect not only student vocational success but also engagement with career-readiness programming. Historically, Sage Oak's CTE pathway completion numbers have appeared low. However, this does not fully represent the program's progress or student participation. While traditional completion rates remain modest due to technical and structural factors, student engagement is growing, and expanded access strategies—like internal capstones and internships—are expected to significantly increase future completions and readiness.

AVID and Synchronous Instruction Expansion – Highly Effective

The rollout of the AVID 9/10 elective and a significant increase in synchronous courses (from 79 to 198 offerings) have greatly expanded access to rigorous and career-connected instruction. These initiatives have been well-received by students and families and directly support both academic achievement and career readiness. The school is on track to meet its three-year goal of 200 synchronous offerings aligned to CTE pathways.

AP Exam Participation and Performance – Emerging Effectiveness, with Need for Broader Access

At Sage Oak South, AP performance has remained strong over the past two years, maintaining a 100% pass rate. In 2022–23, one student took and passed an AP exam, and in 2023–24, two students took and passed, continuing the trend of academic success in advanced coursework. While this consistency reflects strong instructional support and student preparation, the overall number of AP participants remains small. This underscores the ongoing need to increase awareness, access, and enrollment in AP courses to ensure more students benefit from the rigor and college-readiness opportunities these classes provide. As Sage Oak South continues to build its AP program, the goal will be to scale participation while preserving high performance, ensuring equitable access to advanced academic pathways for a broader range of students.

Math and ELA Achievement – Varied Effectiveness by Subgroup

At South, overall iReady and CAASPP performance remained relatively steady, but subgroup outcomes continue to highlight key disparities. Spring iReady results showed improvement, with math increasing from 55% to 56% and ELA rising from 63% to 65% of students achieving at or above grade level. The SWD Math Distance from Standard (DFS) on CAASPP improved significantly from -86.8 to -64.4, indicating progress for students receiving targeted math interventions. However, SED students experienced a sharp decline in CAASPP Math performance, dropping from 32.69% to 21.88% meeting or exceeding standards. Conversely, ELA intervention outcomes improved considerably, with the percentage of students showing one year or more of academic growth rising from 33% to 58%, suggesting that LREBG-funded support staff have positively impacted literacy outcomes. While South is seeing positive momentum in SWD math intervention, the decline among SED students in math is a pressing concern and will remain a central focus for targeted instructional action in 2025–26.

Articulation and Data Use – Strengthening with Significant Progress

Sage Oak has made notable progress in implementing a unified, data-informed articulation process between grade spans, aimed at improving instructional continuity and supporting student transitions. A key indicator of this growth is the increase in teacher-reported confidence, rising from 78% to 98%, in their ability to articulate learning expectations and support students across grade levels. This shift reflects the successful rollout of professional development around MasteryConnect and Power Standards, as well as a growing culture of data-driven collaboration. While continued refinement and system-wide consistency are still in progress, this marked improvement in teacher readiness signals that Sage Oak is moving from foundational development to sustained implementation.

Summary of Effectiveness

Effective Actions: Synchronous CTE course expansion, AVID implementation, professional development, and student access to resources

Partially Effective Actions: Overall CCI performance, A-G pathway counseling, and math interventions.

Currently Ineffective Actions: AP exam preparation at SOCS, CTE pathway completions, academic outcomes for SWD and EL students.

Continued use of formative data, targeted professional development, and engagement with educational partners are essential to improving outcomes across all student groups in the remaining years of this LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

LREBG update

Action 2 has been refocused to reflect the inclusion of Learning Recovery Emergency Block Grant (LREBG) funding. Metric 1.15 now incorporates the strategic use of these funds to expand staffing and strengthen academic interventions for students requiring additional support. This enhancement allows Sage Oak to respond to the increasing number of students in need of targeted instruction. The goal is to help students access and master grade-level standards, leading to improved performance on both local assessments (such as i-Ready) and statewide assessments (such as CAASPP). Emphasis remains on fostering measurable academic growth year over year, with a particular focus on our intervention population.

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Integration of Career, Community, and Life Skills	<p>Integrate career, community, and life skills into comprehensive K-12 pathways.</p> <p>This action is dedicated to integrating career, community, and life skills within comprehensive K-12 pathways. It focuses on equipping students with the essential capabilities needed to navigate their future careers and community life successfully. By weaving these skills into the curriculum, we aim to ensure students are academically prepared and possess the practical skills required for the modern workforce and societal participation. This initiative prioritizes equitable opportunities for all students, emphasizing support for unduplicated students, to lay the groundwork for successful transitions to higher education and careers.</p> <p>Metrics for Effectiveness:</p> <p>1.1 Completion of A-G Requirements: The total number of students successfully completing the A-G requirements, indicating readiness for university admission.</p> <p>1.2 Career Technical Education (CTE) Pathway Completion: The quantity of students completing CTE pathways, reflecting vocational engagement and preparedness.</p>	\$6,719,006.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>1.3 Percentage of Students Achieving a Score of 3 or Higher on AP Exams: The proportion of students who attempt and succeed in Advanced Placement exams, demonstrating college-level academic proficiency.</p> <p>1.4 College and Career Indicator (CCI) Performance: Evaluation of students' readiness for post-secondary opportunities through the College and Career Indicator, assessing comprehensive preparedness for college and careers.</p> <p>1.5 Graduation Rate Improvement: An increase in graduation rates, signifying the effectiveness of educational pathways in guiding students to complete their education.</p> <p>1.6 Maintain Low Middle School Dropout Rates: A maintenance of low dropout rates at the middle school level, identifying early intervention points to maintain student engagement.</p> <p>1.7 Maintain Low High School Dropout Rates: A maintenance of low dropout rates at the high school level, crucial for assessing the pathways' role in sustaining student engagement through graduation.</p> <p>1.8 Expansion of Live Synchronous Instruction Courses Aligned with CTE Pathways: The expansion of live synchronous instruction courses that directly support CTE pathways, measuring the integration of career-oriented education within the academic curriculum.</p> <p>This action is crafted to not only achieve academic benchmarks but also to cultivate a comprehensive educational experience that thoroughly prepares students for both college and career trajectories.</p>		
1.2	Refinement of Multi-Tiered System of Support	<p>Refine a personalized, data-informed multi-tiered system of support. The focus of the services is on students from unduplicated and identified populations.</p> <p>This action aims to refine a personalized, data-informed multi-tiered system of support (MTSS) that caters to the unique needs of each student. By leveraging comprehensive data analysis and targeted interventions, we will enhance academic achievement and support emotional and social development. This approach is designed to ensure all students, especially</p>	\$621,888.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>those facing socio-economic challenges, receive the necessary support to excel academically.</p> <p>Metrics for Effectiveness:</p> <p>1.9 Performance in iReady Assessments for ELA and Math: Proportion of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics, indicating proficiency and readiness.</p> <p>1.10 California Assessment of Student Performance and Progress (CAASPP) Achievement: Percentage of students who have met or exceeded standards in CAASPP assessments for Math and ELA, reflecting comprehensive academic achievement.</p> <p>1.11 CAASPP Performance for Socio-Economically Disadvantaged (SED) Students: Percentage of socio-economically disadvantaged students meeting or exceeding CAASPP standards in Math and ELA, highlighting the effectiveness of targeted support.</p> <p>1.12 Accessibility to Instructional Materials: Percentage of students with full access to necessary instructional materials, ensuring equity in learning resources.</p> <p>1.13 Alignment with State Standards: Percentage of students whose education is fully aligned with state standards, promoting consistent educational quality.</p> <p>1.14 Community Belief in Robust Curriculum: Proportion of parents, students, and teachers who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.</p> <p>1.15 LREBG Action Growth in ELA and Math Among Intervention This action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our intervention programs. By increasing instructional personnel, Sage Oak is able to provide more consistent, small-group, and individualized support for students receiving Tier 2 and Tier 3 interventions. This enhancement directly supports the academic progress of students performing below grade level, particularly those from unduplicated groups and students with disabilities.</p>		

Action #	Title	Description	Total Funds	Contributing
		The goal of this action is to equip students with the skills and confidence needed to meet or exceed grade-level standards. By embedding additional instructional capacity through LREBG-funded staff, we aim to accelerate learning and ensure that a greater percentage of intervention students experience at least one year of academic growth annually. This action reinforces our commitment to equitable access to a robust, rigorous curriculum, supported by the necessary resources and targeted instruction to help all students thrive.		
1.3	Enhancement of Math Proficiency for Students with Disabilities	<p>Improve math proficiency for students with disabilities by increasing the percentage of students with disabilities participating in math interventions.</p> <p>This action is dedicated to improving mathematics proficiency among students with disabilities by expanding their participation in specialized math intervention programs. Recognizing the unique challenges faced by these students, our targeted approach aims to elevate their math skills through personalized and adaptive learning strategies. By doing so, we endeavor to facilitate meaningful academic progress and reduce disparities in math achievement.</p> <p>Metrics for Effectiveness:</p> <p>1.16 Participation Rate in Math Interventions: Increase in the percentage of students with disabilities participating in math intervention programs, aiming to ensure comprehensive access to support services tailored to their needs.</p> <p>1.17 Increased iReady Math Achievement for Students with Disabilities (SWD): Measurement of the number of students with disabilities moving out of Tier 3 in iReady math assessments. Tier 3 represents students performing two or more years below grade level. While measuring achievement at or above grade level for this group may not be appropriate, monitoring their progress out of Tier 3 provides a meaningful indicator of improvement in math proficiency.</p> <p>1.18 California Assessment of Student Performance and Progress (CAASPP) for SWD Math Achievement: Analysis of CAASPP math scores for students with disabilities to track advancements in state-standardized</p>	\$101,536.00	No

Action #	Title	Description	Total Funds	Contributing
		<p>math achievement, with a focus on increasing the percentage of students meeting or exceeding math standards.</p> <p>This action underscores our commitment to inclusivity and equity in education by specifically addressing the needs of students with disabilities. Through targeted math interventions, we aim not only to improve math proficiency but also to foster a supportive learning environment that acknowledges and addresses the diverse needs of our student population.</p>		
1.4	Unified Articulation Process Development	<p>Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.</p> <p>This action focuses on developing a unified, data-informed articulation process to ensure smooth transitions for students as they move through each grade band (e.g., from elementary to middle school, and middle school to high school). By integrating feedback from graduates and utilizing comprehensive data analysis, we aim to refine our educational pathways to better prepare students for the expectations and standards of their next academic phase. This process is designed to enhance communication between teachers across grade bands, ensure curriculum continuity, and address any potential gaps in student preparedness.</p> <p>Metrics for Effectiveness: 1.19 Teacher Preparedness for Student Articulation: The percentage of teachers who feel equipped to effectively prepare and transition their students to the next grade level band. This metric will be measured through targeted surveys asking teachers if they feel confident in their ability to communicate the expectations and standards of the next grade level, ensuring they have the resources and knowledge necessary to support their students' progression.</p> <p>By establishing a comprehensive articulation process that leverages both quantitative data and qualitative feedback from our educational community, this action aims to foster a more cohesive and supportive learning</p>	\$0.00	No

Action #	Title	Description	Total Funds	Contributing
		environment. It ensures that students are not only academically prepared for each transition but also that educators feel supported and equipped to guide them effectively through their educational journey.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	<p>Engagement: Fostering a Supportive and Engaging Learning Environment</p> <p>In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.</p>	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
 Priority 3: Parental Involvement (Engagement)
 Priority 5: Pupil Engagement (Engagement)
 Priority 6: School Climate (Engagement)
 Priority 7: Course Access (Conditions of Learning)
 Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Building on Sage Oak's strategic commitment, Goal 2 aims to cultivate a supportive and engaging learning environment by emphasizing the well-being and professional growth of our staff, alongside fostering stronger connections within our school community. This goal is rooted in the belief that the success of our educational mission is intertwined with the development and satisfaction of our educators and staff. By investing in comprehensive professional development, mentorship programs, and creating a nurturing work environment, we aspire to empower our educators. This empowerment is expected to cascade, enhancing the educational experience for students and fostering a sense of belonging and community alignment with Sage Oak's mission and vision.

Sage Oak's efforts are influenced by feedback from the WASC visiting committee and include specific action steps aimed at increasing opportunities for parent and student engagement, developing purposeful professional growth pathways for staff, enhancing live instruction through targeted professional development, and establishing a robust system for social and emotional support. These targeted actions demonstrate Sage Oak's balanced approach to educational excellence, ensuring every member of our community is supported to thrive. Furthermore, these initiatives directly contribute to increased or improved services for our unduplicated student populations, including socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. By creating a more engaging, supportive, and well-resourced learning environment, we aim to elevate the educational outcomes and well-being of these students, ensuring that our programs and resources are tailored to meet their specific needs and challenges. This aligns with our objectives to deliver equitable, high-quality educational opportunities, making significant strides in supporting all students, particularly those who require additional assistance, to achieve success and reach their full potential.

Through increased staffing funded by the Learning Recovery Emergency Block Grant (LREBG), Sage Oak is expanding access to social-emotional supports as outlined in Goal 2, Action 4. This targeted investment strengthens our ability to meet the diverse needs of all students, supporting their academic growth, social-emotional well-being, and readiness for future college and career pathways. This approach reflects Sage Oak's continued commitment to equitable, high-quality educational opportunities for every learner.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintenance of Positive Community Engagement Perception % of parents, students, and staff that believe Sage Oak makes a significant effort to foster community engagement	Parents- 99% Students- 99% Staff- 100% Source: Internal 23-24	Parents - 88% Students - 89% Staff - 97%		Parents- 90% Students- 90% Staff- 90%	Parents -11% Students-10% Staff -3%
2.2	Maintain 100% Credentialed Teachers % of credentialed teachers	100% Source: Internal 23-24	100%		100%	0
2.3	Maintenance of High Attendance Rate % of school attendance rates (ADA)	99.7% Source: Internal 23-24	99.5%		98% or higher	-.2%
2.4	Maintenance of Low Chronic Absenteeism	2%	.3%		Below 3%	-1.7%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of chronic absenteeism	Source: CA Dashboard 23-24				
2.5	Maintenance of Low Suspension and Expulsion Rates % suspension and expulsion rates	Suspension- 0% Expulsion- 0% Source: CA Dashboard and Dataquest 22-23	Suspension 0% Expulsion 0%		Suspension- 0% Expulsion- 0%	Suspension 0 Expulsion 0
2.6	Maintain Positive Connection to School's Mission % of the parents, students and staff that feel connected to the school's mission	Parents- 97% Students- 63% Staff- 96% Source: Internal 23-24	Parents - 89% Students - 91% Staff -95%		Parents- 90% Students- 90% Staff- 90%	Parents -8% Students 28% Staff -1%
2.7	Increased Student Retention Rate student retention rate	67% Source: Internal 22-23	60%		75%	-7%
2.8	Maintain Positive School Climate % of the parents, students and staff that feel the school priorities safety, value and respect	Parents -99% Students -97% Staff -97% Source: Internal 23-24	Parents -98% Students - 98% Staff -99%		Parents -90% Students - 90% Staff -90%	Parents -1% Students 1% Staff 2%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.9	Confidence and Integration of New Strategies % of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles	100% Source: Internal 23-24	100%		100%	0
2.10	Increased Retention Rates of Participating Staff retention rates of staff members who have participated in the professional development pathways	72% Source: Internal 23-24	83%		80%	11%
2.11	Expansion of Professional Development Opportunities # of professional development opportunities offered to staff, focusing on live instruction	4 Source: Internal 23-24	6		10	2

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.12	Improved Staff Confidence in Job Performance % of staff who believe they are well-equipped by Sage Oak to perform their roles effectively	96% Source: Internal 23-24	97%		90% or higher	1%
2.13	Increased Awareness of Socio-Emotional Resources % of parents, students, and staff that report feeling informed about the social and emotional resources provided by Sage Oak	Parents- 86% Students- 78% Staff- 93% Source: Internal 23-24	Parents -94% Students -90% Staff -94%		Parents- 90% Students- 90% Staff- 90%	Parents 8% Students 12% Staff 1%
2.14	Expansion of Synchronous Support Opportunities # of synchronous support groups or classes with counselors	23 Source: Internal 23-24	66		29	43

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

For the 2024–2025 academic year, Goal 2 focused on increasing student engagement and improving attendance by cultivating a positive instructional culture, enhancing live synchronous learning, expanding professional development aligned to instructional quality, and maintaining a strong school climate. A particular emphasis was placed on improving instructional strategies used during live synchronous sessions to ensure increased student engagement and academic support for all student groups.

The core areas of implementation included:

Providing multiple rounds of professional development with a key focus on live instruction;

Strengthening staff confidence, leadership qualities, and instructional consistency;

Maintaining low rates of suspension, expulsion, and chronic absenteeism;

Increasing student access to social-emotional learning (SEL) resources and real-time supports by also utilizing LREBG funds to increase staffing.

These actions were fully launched and sustained throughout the year, demonstrating strong alignment with the original LCAP action plan.

While all key actions were implemented, a few notable differences emerged:

Professional Development Expansion Beyond Baseline: Sage Oak implemented six professional development sessions, increasing from four in 23-24. These sessions provided teachers with hands-on learning in research-based strategies, including cognitive task analysis (CTA), visible learning goals (VLG), and classroom discussion techniques. Sessions were grounded in John Hattie's visible learning research and equipped teachers with high-impact strategies that were both practical and classroom-ready. This marked a clear step forward in building a more robust instructional culture.

Expansion of Synchronous Instruction Professional Development: To support implementation of high-leverage instructional strategies, Sage Oak also provided targeted training on technology platforms such as Nearpod, Classkick, Canva, and MagicSchool AI. This shift allowed instructors to directly apply tools that enhance student engagement and formative assessment during live classes as well as to explore and apply evidence-based strategies—such as cognitive task analysis, classroom discussion techniques, and the use of visible learning goals—well beyond the original plan.

SEL System Growth: Access to real-time SEL support expanded from 23 to 66 counselor-led sessions, directly contributing to improved awareness and use of resources across campuses.

Sage Oak South's retention decline from 67% to 60% suggests that while many families are drawn to the model, some may engage with it as a short-term solution, pointing to a need for more targeted support and engagement strategies to sustain long-term enrollment.

Challenges Encountered

Student retention at Sage Oak South dropped from 67% to 60%, pointing to the need to better understand and address the factors contributing to short-term enrollment patterns..While overall enrollment continues to grow year over year—demonstrating sustained interest

in Sage Oak's model— these trends suggest a gap between initial interest and long-term commitment. Based on an analysis of student retention data, the most common reasons families leave Sage Oak South include challenges with family dynamics, a desire for increased social interaction and peer engagement, and a preference for in-person high school experiences—particularly for athletics and extracurricular involvement. To address this, Sage Oak will examine the full student journey—focusing on early onboarding, relationship-building touchpoints, and targeted re-engagement support. Opportunities include creating more structured transitions for new families, monitoring engagement indicators, creating a parent engagement team, surveying students to determine the reason behind their withdrawal, and refining instructional pathways to better meet diverse student needs. Improving retention will be a key focus in the year ahead to ensure students remain connected and supported throughout their learning experience. Continued support for families navigating personalized learning, along with strategic community partner outreach, may also address key areas of concern.

Professional Development Pacing and Depth: Reflecting on teacher feedback showed some professional development sessions covered dense content in short timeframes. Future iterations may benefit from spreading content over time to allow deeper skill-building.

Successes in Implementation:

School Climate and Connection Metrics Improved

School Climate:

Students: 95%+ reported feeling safe, valued, and respected.

Parents: 90–99% reported strong satisfaction with the school environment.

Staff: Reported 99% alignment with a positive, respectful climate.

Parent Advisory Council Insight: Parents highlighted the personalized learning model and strong advisor relationships as standout strengths that contributed to their child's academic success and emotional well-being.

Connection to Mission:

Student connections to Sage Oak's mission rose to 91%

Awareness of SEL Supports:

90%+ of students and staff, and over 91% of parents, reported feeling informed about the availability of SEL services and resources.

Parent Advisory Council feedback also emphasized increased visibility of mental health resources and proactive outreach from SEL counselors as key contributors to a supportive school environment.

Instructional and Staff Support Strengthened

Professional Development Reach and Effectiveness : Six targeted sessions reached all instructors, with structured implementation of strategies like visible learning goals and cognitive task analysis. Staff reported high relevance and practical use.

Zero Suspension/Expulsion Rates: Continued success maintaining 0% suspension and expulsion rates reflects a healthy and proactive school culture.

Strong ADA Performance : Average daily attendance remained very high at 99.5%

Leadership Pathway: Purposeful pathways for staff growth strengthened confidence and implementation of new strategies.

Sage Oak's implementation of Goal 2 in 2024–2025 achieved strong results in the areas of school climate, live instructional practice, professional development success, and Socio-Emotional Learning resource access. While the drop in student retention signals the need for

further investment in personalized outreach and transitional supports, the overwhelmingly positive student, staff, and parent perceptions of safety, connection, and instructional quality demonstrate meaningful growth. Notably, positive feedback from the Parent Advisory Council reinforced the value of personalized academic support, strong advisor relationships, and visible SEL services. Together, these strengths reflect Sage Oak's deep commitment to student well-being and instructional excellence.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 2.4 related to increased expenditures for social and emotional support, and 2.2 and 2.3 related to professional development.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Moderately to Highly Effective

The actions implemented under Goal 2—focused on building a supportive school climate, strengthening live synchronous instruction, and expanding SEL access—have been largely effective in meeting the goal's intended outcomes. Despite mild challenges with student retention, other core metrics such as school safety, connection to mission, staff confidence, and SEL awareness showed substantial gains.

Enhancing Community Connection Opportunities - Highly Effective

This action supported campus-wide engagement systems that contributed to:

97 %+ of students and staff feel connected to the school mission;

Strong community perception scores: 90 %+ of families and students reported feeling valued, safe, and respected;

Continued 0% suspension and expulsion rates across all schools.

These outcomes suggest that the action was effective in fostering a positive and inclusive school environment.

Development of Professional Growth Pathways - Effective with Continued Potential

Participation in leadership pathways and professional development programs resulted in:

100% of participants reported increased confidence in using new strategies;

Staff retention among professional development participants improved to 83%, a strong indicator of job satisfaction and institutional alignment.

The action shows a clear impact on instructional culture and talent development. Ongoing refinement of professional development alignment with instructional practice will support even deeper results.

Enhancement of Professional Development for Live Instruction - Highly Effective

Six professional development sessions were conducted, surpassing the baseline of four.

Sessions were tailored using adult learning theory and emphasized role-based collaboration and implementation strategies.

Staff adopted new tools (e.g., Classkick, MagicSchool AI) and visible learning practices with high fidelity.

High perception of staff confidence in feeling equipped to perform their job based on the professional development received.

This action had a direct impact on instructional consistency and teacher preparedness for live, synchronous settings.

Development of Social and Emotional Support Systems - Strongly Effective

Synchronous SEL sessions more than doubled from 23 to 66, and:

Over 90% of families, students, and staff reported being informed about SEL resources.

SEL access and awareness improved, supporting chronic absenteeism rates well below 3%.

Sage Oak South added dedicated teachers using LREBG funds to ensure every student has access to resources.

This action contributed meaningfully to the overall school climate and student engagement, particularly for students needing SEL Tier 1–2 support.

Less Effective Area: Student Retention

While the actions described above showed strong effectiveness, student retention declined. This suggests that although school climate and instructional quality are high, additional support is needed to deepen students' long-term commitment, especially during key transition points and for new students. Strategic refinements in onboarding, connection-building, and early intervention are areas for improvement moving forward.

Conclusion

Most actions under Goal 2 were effective or highly effective in strengthening the school climate, increasing staff instructional capacity, and expanding SEL access. The only area where effectiveness fell short was student retention. This outcome does not undermine the strength of the overall program but indicates a need for deeper focus on engagement strategies tied to long-term student persistence. The foundation built through this year's actions sets a strong trajectory for targeted improvements in the upcoming LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Goal 2, Action 4 has been strengthened through the integration of Learning Recovery Emergency Block Grant (LREBG) funding to expand staffing and enhance the delivery of social-emotional supports and intervention services. This strategic use of funds supports increased access to counselors, SEL sessions, and individualized outreach for students requiring additional support—reflected in Metrics 2.13 and 2.14.

This enhancement enables Sage Oak to proactively meet the needs of a growing number of students identified for Tier 2 and Tier 3 social-emotional and academic interventions. The goal is to ensure every student has access to timely, responsive services that foster well-being, increase readiness to learn, and contribute to long-term academic success. These adjustments affirm Sage Oak's commitment to equity-driven, data-informed planning that empowers all students to thrive.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Enhancing Community Connection Opportunities	<p>Increase opportunities for parents and students to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision.</p> <p>This action is dedicated to increasing opportunities for meaningful engagement among parents, students, and school leadership. By fostering a deeper sense of community and ensuring alignment with the school's mission and vision, we aim to create an inclusive environment that supports professional growth and student success. Initiatives will include structured forums for feedback, engagement events, and clear communication channels that encourage active participation from all members of our school community.</p> <p>Metrics for Effectiveness:</p> <p>2.1 Community Engagement Perception: Measurement of the community's perception regarding the school's efforts to provide opportunities for involvement and input. This will be assessed through surveys asking if participants believe Sage Oak makes a significant effort to foster community engagement.</p> <p>2.2 Retention of Credentialed Teachers: Maintaining a 100% rate of credentialed teachers, ensuring that students have access to qualified and dedicated professionals.</p> <p>2.3 Attendance Rate Stability: Maintenance of school attendance rates at optimal levels, reflecting student engagement and a supportive learning environment.</p> <p>2.4 Low Chronic Absenteeism: Sustaining low rates of chronic absenteeism, indicating an engaging and welcoming school climate that motivates regular attendance.</p>	\$585,150.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>2.5 Low Suspension and Expulsion Rates: Keeping suspension and expulsion rates minimal, demonstrating effective behavior management and a positive school culture.</p> <p>2.6 Connection to School's Mission: Proportion of the school community that feels connected to the school's mission of empowering students, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives.</p> <p>2.7 Student Retention Rate Improvement: An increase in the student retention rate, indicating success in creating a supportive and engaging environment that encourages students to continue their education at Sage Oak.</p> <p>2.8 School Climate: Proportion of the school community that feels safe, respected and values, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives.</p> <p>Through these targeted actions and metrics, we aim to not only enhance the sense of community and engagement within our school but also to ensure that our educational environment is conducive to professional growth, student success, and sustained participation from our entire school community.</p>		
2.2	Development of Professional Growth Pathways	<p>Develop purposeful pathways for growth and opportunities for professional development.</p> <p>This action focuses on creating purposeful pathways for professional growth, offering expansive opportunities for all staff members to develop. By initiating comprehensive leadership and professional development programs, we aim to equip our staff with the skills and confidence necessary to innovate and enhance their respective practices across the board. This initiative is designed to cultivate a culture that values continuous learning, adaptability, and professional excellence, contributing significantly to the overall effectiveness and sustainability of our educational environment.</p>	\$196,288.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>Metrics for Effectiveness:</p> <p>2.9 Confidence and Integration of New Strategies: The proportion of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles. This will be assessed through surveys that inquire about their readiness to incorporate these strategies into future practices, reflecting the professional development programs' impact on enhancing staff capabilities.</p> <p>2.10 Retention Rates of Participating Staff: The retention rates of staff members who have participated in the professional development pathways will be closely monitored. A positive trend in these rates would indicate the success of the development opportunities in promoting job satisfaction, personal growth, and a strong commitment to the institution.</p> <p>This action underscores our dedication to fostering professional growth and development across all staff levels, enhancing our school's capacity to provide a high-quality, supportive, and engaging learning environment for all community members.</p>		
2.3	Enhancement of Professional Development for Live Instruction	<p>Increase professional development for live instruction.</p> <p>This action targets the expansion of professional development opportunities tailored to live instruction, aiming to empower our staff with the skills and techniques necessary for dynamic and effective real-time teaching. By providing a diverse array of training sessions, workshops, and seminars focused on live instructional strategies, we are committed to ensuring that all staff members feel confident and well-prepared to engage students in a live setting. This initiative is designed to elevate the quality of live instruction, ensuring that our educational delivery is both impactful and engaging.</p> <p>Metrics for Effectiveness:</p> <p>2.11 Expansion of Professional Development Opportunities: Tracking the increase in professional development opportunities offered to staff, focusing on live instruction. This metric will encompass school-created</p>	\$34,753.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>programs and external training opportunities included in our professional development portfolio.</p> <p>2.12 Staff Confidence in Job Performance: The percentage of staff who believe they are well-equipped by Sage Oak to perform their roles effectively, particularly in the context of live instruction, based on the professional development received. This will be measured through surveys assessing staff perceptions of their preparedness and the adequacy of professional development support provided by the school.</p> <p>Through this targeted approach to professional development, we aim to not only enhance the effectiveness of live instruction but also to foster a culture of continuous learning and adaptability among our staff. This action reaffirms our commitment to supporting professional excellence and student success in every live instructional encounter.</p>		
2.4	Development of Social and Emotional Support Systems	<p>Develop a system to increase access and consistency for social and emotional resources and interventions.</p> <p>This action is dedicated to developing a comprehensive system designed to increase access to and consistency of social and emotional resources and interventions for our school community. Recognizing the critical importance of social and emotional well-being in educational success, we aim to ensure that students, parents, and teachers are well-informed and have easy access to the support services they need. Through this initiative, we will enhance our existing resources, introduce new interventions, and expand synchronous support opportunities, such as groups or classes led by counselors, to address the diverse needs of our community effectively.</p> <p>Additionally, this action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our counseling offerings.</p> <p>Metrics for Effectiveness:</p>	\$54,759.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>2.13 Awareness of Socio-Emotional Resources: The percentage of parents, students, and teachers that report feeling informed about the social and emotional resources provided by Sage Oak. This measure will assess the effectiveness of our communication strategies and the accessibility of our resources.</p> <p>2.14 Expansion of Synchronous Support Opportunities: The increase in the number of synchronous support groups or classes with counselors, reflecting our commitment to providing real-time, interactive support sessions that cater to the emotional and social needs of our students. By implementing this action, we aim to create a nurturing and supportive environment that prioritizes the social and emotional well-being of our students. This comprehensive support system will not only address immediate needs but also contribute to the long-term resilience and success of our school community.</p>		

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	<p>Conditions of Learning: Efficient Operations with a Focus on Sustainability</p> <p>Leverage technologies, specifically Artificial Intelligence, to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency.</p>	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Understanding the importance of future-proofing its educational approach, Sage Oak integrates robust systems that prioritize sustainability and efficiency into its strategic plan. This initiative focuses on streamlining operations, optimizing resources, and adopting sustainable practices, aligning with the school's mission and values. By leveraging Artificial Intelligence and other advanced technologies, Sage Oak aims to provide personalized learning pathways, ensuring education is more accessible, engaging, and effective for students. This forward-thinking approach prepares the Sage Oak community for a rapidly evolving educational landscape, embodying the school's commitment to innovation and excellence.

Sage Oak's current staff-to-student ratio of 13:1 highlights our dedicated investment in staffing to ensure personalized learning. With efforts to enhance operational efficiency, we anticipate a more optimized staff-to-student ratio. This adjustment will enable us to extend our educational reach without compromising the quality of instruction. By streamlining administrative tasks, teachers can dedicate more attention to enriching student interactions, further improving the educational experience. This strategic approach ensures that resources are maximized for the direct benefit of our students, aligning with our mission to provide high-quality, focused education.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Staff to Student Ratio Improvement staff to student ratio	13:1 Source: Internal 22-23	13:1		19:1	0
3.2	Improved Work Efficiency and Satisfaction % of staff reporting noticeable improvements in work efficiency and satisfaction	93% Source: Internal 23-24	92%		90% or higher	-1%
3.3	Increased Staff Confidence in Using AI Tools % of staff reporting confidence in their ability to use AI tools to improve learning outcomes	79% Source: 23-24	91%		90% or higher	12%

Goal Analysis [2024-25]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Goal 3 was developed to promote efficient, sustainable school operations and innovative instructional systems through the strategic integration of Artificial Intelligence (AI) and other advanced technologies. These systems were designed to streamline internal processes, improve staff productivity, and empower educators to deliver personalized learning pathways for students. The focus for 2024–2025 was on establishing foundational tools and practices that enhance both operational efficiency and academic effectiveness.

Two primary actions drove implementation:

Technology Optimization for Enhanced Operations, targeting back-end systems and staff workflows.

AI-Driven Personalized Learning Implementation, aimed at increasing staff capacity to use AI tools for instructional planning and student support.

These efforts laid the groundwork for increased staff satisfaction, improved staff-to-student ratios, and an innovative educational model responsive to student needs.

While all major action steps were initiated, there were a few substantive implementation shifts and enhancements:

Focus on Foundational AI Training: Although AI tools were introduced with the intent of deep classroom integration, Year 1 focused more heavily on building staff confidence and familiarity with AI tools like MagicSchool AI and ChatGPT for lesson planning and data analysis, rather than direct instructional use. This adjustment was intentional and acknowledged the steep learning curve for many educators.

Technology Integration for Support Functions: Implementation also prioritized the automation of routine tasks (e.g., calendaring, internal form processing, survey analysis) before full integration into student-facing systems. This choice maximized short-term impact on operational efficiency while giving instructional teams time to build readiness.

Minor Challenges Encountered

Staff Learning Curve with AI Tools: A key challenge was the varying levels of technology comfort among staff, especially when shifting from traditional tools to AI-enhanced platforms. While professional development was provided, some staff required additional time and support to adopt new workflows.

Complexity of Measuring AI Impact on Student Learning: While staff confidence and operational workflows showed visible improvements, the direct impact of AI on student learning outcomes was harder to isolate and quantify within the first year. This limited the ability to fully assess the academic effectiveness of personalized AI-driven learning strategies.

System Integration and Scalability: Implementing scalable, unified platforms across all school sites proved more complex than anticipated. Aligning digital systems with existing workflows required ongoing coordination between technology, instruction, and administration teams.

Successes in Implementation

Positive Staff-to-Student Ratio Trends: The staff-to-student ratio remains at 13:1, consistent with the baseline from prior years. While the target ratio of 19:1 remains a future goal tied to long-term automation and operational streamlining, the metric has not yet shifted. This underscores that 2024–2025 was a foundational year, focused on building the systems and capacity necessary to enable future scaling.

Staff Satisfaction and Operational Efficiency Gains: Internal surveys showed that 92% of targeted staff reported improvements in work efficiency and satisfaction. Streamlining scheduling, attendance tracking, and instructional prep with AI-supported tools significantly reduced time on routine tasks.

Staff Confidence in AI Readiness: 91% of staff reported confidence in using AI tools to improve learning outcomes—a foundational win that sets the stage for more advanced applications in Year 2.

Instructional Adaptability: Staff began incorporating AI tools into lesson planning, progress monitoring, and assessment feedback. This adaptability helped align personalized learning strategies to individual student needs, especially in virtual and hybrid learning contexts.

The first year of Goal 3 implementation laid a strong operational and instructional foundation for long-term sustainability and innovation. While some of the deeper academic impacts of AI-driven personalization will require continued development and measurement, the

improvements in staff efficiency, tool readiness, and system scalability are already enhancing learning conditions across campuses. These successes confirm that Sage Oak is well-positioned to expand AI use and maximize its impact on teaching, learning, and operational excellence in the years ahead.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on actions 3.1 and 3.2 related to increased expenditures for enhancing the schools technology operations and development for artificial intelligence personalized learning.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The specific actions under Goal 3—focused on technology optimization and AI-driven personalized learning—were implemented and show emerging effectiveness. While most measurable outcomes are still in early stages or pending full implementation, important groundwork was laid to support future gains in operational efficiency, instructional innovation, and scalable systems.

Technology Optimization for Enhanced Operations - Strongly Effective

This action centered on streamlining Sage Oak's internal operations using automation and smarter technology workflows. While staff-to-student ratio improvements (from the baseline of 13:1) maintained from year 1, implementation of AI-assisted scheduling, form processing, and internal workflow tools significantly improved work satisfaction and productivity.

92% of staff surveyed reported improved work efficiency and satisfaction, indicating a continual shift toward more streamlined operations. Automation tools were deployed to reduce administrative burden, though longitudinal impact on staffing efficiency will be more visible in Years 2–3.

AI-Driven Personalized Learning Implementation - Foundational Progress with Early Signs of Impact

91% of staff reported confidence in using AI tools to support instruction—12 points up from the baseline, signaling strong early uptake.

AI tools were successfully incorporated into lesson planning, formative assessment, and curriculum design in limited pilot settings.

Broader adoption into instructional practice is still in progress and will require additional professional development and model-sharing in Year 2. Staff confidence has grown substantially, positioning this action as effective in building capacity, though full implementation and measurable student outcomes are still forthcoming.

Actions under Goal 3 show early-stage effectiveness, particularly in building staff readiness and improving operational workflows. Staff satisfaction and AI tool adoption are trending positively, which lays a solid foundation for Year 2 impact. However, metrics like staff-to-student ratio and academic impact of personalized AI strategies remain aspirational targets, with outcomes expected to materialize as systems mature.

Continued professional development, targeted AI use cases, and a strategic focus on scalability will be essential to turning this year's investments into long-term, measurable improvements in both operations and learning outcomes.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes were made to the planned goal, metrics, target outcomes, or action for the coming year.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Technology Optimization for Enhanced Operations	<p>Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.</p> <p>This action is centered on the critical evaluation, integration, and optimization of technology, with a particular emphasis on Artificial Intelligence (AI), to streamline and automate operational processes and procedures across our institution. By harnessing advanced technologies, we aim to significantly improve operational efficiency, reduce manual workload, and foster an environment that supports sustainable growth and academic excellence. This initiative will involve a comprehensive review of current technologies, identification of automation opportunities, and the strategic implementation of technological solutions to meet our operational goals.</p> <p>Metrics for Effectiveness: 3.1 Staff-to-Student Ratio Improvement: Monitoring changes in the staff-to-student ratio as a direct outcome of technological optimizations, aiming for a more effective and efficient distribution of resources. 3.2 Work Efficiency and Satisfaction: The percentage of staff reporting noticeable improvements in work efficiency and satisfaction following the implementation of new technology solutions. This metric will be assessed through surveys designed to capture staff perceptions of the impact of technological advancements on their daily operations and overall job satisfaction.</p>	\$414,398.00	No

Action #	Title	Description	Total Funds	Contributing
		Through this initiative, we aim to leverage cutting-edge technology to create a more streamlined, efficient, and sustainable operational framework that supports our educational mission and enhances the conditions of learning for our students and staff.		
3.2	AI-Driven Personalized Learning Implementation	<p>Implement AI-driven personalized learning strategies to maximize student learning.</p> <p>This action aims to implement Artificial Intelligence (AI)-driven personalized learning strategies to maximize student learning outcomes. By harnessing the power of AI, we plan to tailor educational content and instruction to meet the individual needs of each student, thereby enhancing learning efficiency, engagement, and academic achievement. This initiative will involve training staff to effectively use AI tools and integrate them into our curriculum to provide a more adaptive and responsive learning experience for students.</p> <p>Metrics for Effectiveness:</p> <p>3.3 Staff Confidence in Using AI Tools: The percentage of staff reporting confidence in their ability to use AI tools to improve learning outcomes, based on the training received. This metric will assess the effectiveness of professional development programs in equipping staff with the necessary skills to implement AI-driven instructional strategies.</p> <p>Through the adoption of AI-driven personalized learning strategies, we aim to create a more engaging, inclusive, and effective educational environment that caters to the diverse learning styles and needs of our students, thereby supporting our mission of fostering academic growth and operational efficiency.</p>	\$53,989.00	Yes

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2025-26]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$444,996	\$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
\$ 5,660,940	0.000%	\$0.00	

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	<p>Action: Integration of Career, Community, and Life Skills</p> <p>Need: All students, including unduplicated students, require enhanced access to career, community, and life skills education due to historical inequities and limited access to external resources.</p>	This action provides enhanced access to career, community, and life skills education through dedicated synchronous courses and counseling supports (Action 1.1). While offered LEA-wide, the curriculum and support are intentionally designed with differentiated content and targeted outreach to ensure unduplicated students, who historically have less access to these resources, receive services that are increased in intensity and improved in quality and relevance compared to a universal offering without these targeted elements.	Completion of A-G Requirements, Career Technical Education (CTE) Pathway Completion, Percentage of Students Achieving a Score of 3 or Higher on AP Exams.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	This is the most effective approach to ensure equitable access and outcomes across the geographically diverse LEA.	
1.2	Action: Refinement of Multi-Tiered System of Support Need: Unduplicated students demonstrate persistent academic achievement gaps and socio-emotional needs requiring intensified and differentiated support. Scope: LEA-wide	This action refines the LEA-wide MTSS to provide increased levels of targeted, small-group instruction and improved socio-emotional supports (Action 1.2), particularly for unduplicated students identified through data analysis. The LEA-wide scope ensures consistent access to these tiered interventions across all locations, but the design and resource allocation (including LREBG-funded staffing) are principally directed towards and intensified for unduplicated pupils to accelerate their academic growth and address well-being challenges more effectively than a universal support system.	Performance in iReady Assessments for ELA and Math, and CAASPP Achievement for English learners, foster youth, and low-income students.
2.1	Action: Enhancing Community Connection Opportunities Need: Foster youth, English learners, and low-income students often face barriers to full participation in school activities, which can affect their sense of belonging and engagement with the school community. Scope: LEA-wide	Increasing community connection opportunities addresses this need by creating inclusive, accessible engagement activities that encourage participation from all students and their families, regardless of background. This action aims to build a stronger, more cohesive school community where unduplicated students feel valued and supported.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.2	Action:	Providing professional growth pathways for all educators ensures a high-quality educational	Increased Confidence and Integration of New

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	<p>Development of Professional Growth Pathways</p> <p>Need: Educators require ongoing professional development to effectively meet the diverse needs of all students, fostering an engaging and supportive learning environment.</p> <p>Scope: LEA-wide</p>	experience for every student, including unduplicated students. This school wide action supports the continuous improvement of teaching strategies that directly benefit these groups by enhancing educators' skills and knowledge.	Strategies by staff, and retention rates of participating staff, which indirectly reflect the improved educational environment for unduplicated students.
2.3	<p>Action: Enhancement of Professional Development for Live Instruction</p> <p>Need: Effective live instruction requires specific pedagogical skills, particularly to engage unduplicated students who may have varied learning needs and preferences.</p> <p>Scope: LEA-wide</p>	Enhancing professional development for live instruction across the LEA ensures that all educators are equipped to deliver engaging, high-quality live instruction that caters to the diverse needs of all students, including unduplicated groups. This approach is crucial for maintaining student engagement and improving learning outcomes.	Expansion of Professional Development Opportunities focusing on live instruction, and improvement in staff confidence in job performance, particularly in engaging and instructing unduplicated students effectively.
2.4	<p>Action: Development of Social and Emotional Support Systems</p> <p>Need: Unduplicated students, particularly foster youth, English learners, low-income, and homeless students, face significant socio-emotional barriers impacting their educational success.</p>	This action develops an LEA-wide system to increase access to and improve the consistency and targeting of social and emotional resources and interventions (Action 2.4). While available to all, the system is designed with specific components, such as dedicated counselor support and tailored interventions (including LREBG-funded staffing), that are principally directed towards and intensified for unduplicated students to address their unique and heightened socio-	Awareness of Socio-Emotional Resources, Expansion of Synchronous Support Opportunities

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	emotional needs more effectively than a universal approach. The LEA-wide scope ensures equitable access to these intensified supports across all locations.	
3.2	Action: AI-Driven Personalized Learning Implementation Need: English learners and low-income students, in particular, benefit from personalized learning strategies that tailor instruction to their unique needs and learning styles, addressing gaps in knowledge and accelerating progress. Scope: LEA-wide	Implementing AI-driven personalized learning strategies on a schoolwide basis ensures that all students, especially unduplicated students, receive customized educational experiences designed to maximize their learning potential. This approach is critical for closing achievement gaps and supporting the academic growth of each student.	Increased Staff Confidence in Using AI Tools, Staff to Student Ratio Improvement, Improved Work Efficiency and Satisfaction.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
-------------------	--------------------	---	------------------------------------

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

--

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

n/a

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	n/a	n/a
Staff-to-student ratio of certificated staff providing direct services to students	n/a	n/a

2025-26 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	\$ 5,660,940	\$444,996	\$ 5,660,940	0.000%	

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$6,772,473.00	\$1,908,538.00	\$0.00	\$100,756.00	\$8,781,767.00	\$6,511,683.00	\$2,270,084.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Integration of Career, Community, and Life Skills	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$5,202,367.00	\$1,516,639.00	\$5,366,240.00	\$1,334,470.00	\$0.00	\$18,296.00	\$6,719,006.00	
1	1.2	Refinement of Multi-Tiered System of Support	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$578,671.00	\$43,217.00	\$251,642.00	\$287,786.00	\$0.00	\$82,460.00	\$621,888.00	
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	Students with Disabilities	No			All Schools	Fiscal 2025-26	\$0.00	\$101,536.00	\$1,766.00	\$99,770.00	\$0.00	\$0.00	\$101,536.00	
1	1.4	Unified Articulation Process Development	All	No			All Schools	Fiscal 2025-26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
2	2.1	Enhancing Community Connection Opportunities	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$537,009.00	\$48,141.00	\$582,986.00	\$2,164.00	\$0.00	\$0.00	\$585,150.00	
2	2.2	Development of Professional Growth Pathways	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$196,288.00	\$92,996.00	\$103,292.00	\$0.00	\$0.00	\$196,288.00	
2	2.3	Enhancement of Professional Development for Live Instruction	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$34,753.00	\$34,753.00	\$0.00	\$0.00	\$0.00	\$34,753.00	
2	2.4	Development of Social and Emotional Support Systems	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$54,759.00	\$0.00	\$0.00	\$54,759.00	\$0.00	\$0.00	\$54,759.00	
3	3.1	Technology Optimization for Enhanced Operations	All	No			All Schools	Fiscal 2025-26	\$138,877.00	\$275,521.00	\$404,764.00	\$9,634.00	\$0.00	\$0.00	\$414,398.00	

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
3	3.2	AI-Driven Personalized Learning Implementation	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2025-26	\$0.00	\$53,989.00	\$37,326.00	\$16,663.00	\$0.00	\$0.00	\$53,989.00	

2025-26 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$ 5,660,940	\$444,996	\$ 5,660,940	0.000%		\$6,365,943.00	0.000%	0.000 %	Total:	\$6,365,943.00
								LEA-wide Total:	\$6,365,943.00
								Limited Total:	\$0.00
								Schoolwide Total:	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Integration of Career, Community, and Life Skills	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$5,366,240.00	
1	1.2	Refinement of Multi-Tiered System of Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$251,642.00	
2	2.1	Enhancing Community Connection Opportunities	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$582,986.00	
2	2.2	Development of Professional Growth Pathways	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$92,996.00	
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$34,753.00	
2	2.4	Development of Social and Emotional Support Systems	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$0.00	
3	3.2	AI-Driven Personalized Learning Implementation	Yes	LEA-wide	English Learners Foster Youth	All Schools	\$37,326.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
					Low Income			

2024-25 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$6,461,764.00	\$6,805,652.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Integration of Career, Community, and Life Skills	Yes	\$5,505,141.00	\$5,496,672.00
1	1.2	Refinement of Multi-Tiered System of Support	Yes	\$392,387.00	\$287,986.00
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	No	\$4,881.00	\$109,722.00
1	1.4	Unified Articulation Process Development	No	\$150.00	\$0.00
2	2.1	Enhancing Community Connection Opportunities	Yes	\$412,437.00	\$406,713.00
2	2.2	Development of Professional Growth Pathways	Yes	\$5,977.00	\$110,398.00
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	\$1,806.00	\$29,349.00
2	2.4	Development of Social and Emotional Support Systems	Yes	\$50,900.00	\$105,015.00
3	3.1	Technology Optimization for Enhanced Operations	No	\$86,600.00	\$220,925.00
3	3.2	AI-Driven Personalized Learning Implementation	Yes	\$1,485.00	\$38,872.00

2024-25 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$800,286	\$5,049,800.00	\$5,415,645.00	(\$365,845.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Integration of Career, Community, and Life Skills	Yes	\$4,452,389.00	\$4,656,517		
1	1.2	Refinement of Multi-Tiered System of Support	Yes	\$177,336.00	\$141,210		
2	2.1	Enhancing Community Connection Opportunities	Yes	\$412,437.00	\$406,713		
2	2.2	Development of Professional Growth Pathways	Yes	\$4,276.00	\$80,364		
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	\$1,806.00	\$29,349		
2	2.4	Development of Social and Emotional Support Systems	Yes	\$71.00	\$62,620		
3	3.2	AI-Driven Personalized Learning Implementation	Yes	\$1,485.00	\$38,872		

2024-25 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$5,967,320	\$800,286	0	13.411%	\$5,415,645.00	0.000%	90.755%	\$0.00	0.000%

Local Control and Accountability Plan Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at LCFF@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in EC sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statutes of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2025-26, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
 - If the LEA has unexpended LREBG funds the LEA must provide the following:
 - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
 - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
 - An explanation of how the action is aligned with the allowable uses of funds identified in [EC Section 32526\(c\)\(2\)](#); and
 - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by [EC Section 32526\(d\)](#).
 - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the [LREBG Program Information](#) web page.
 - Actions may be grouped together for purposes of these explanations.
 - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
 - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32526(d), to provide the information identified above or to include actions funded with LREBG funds within the 2025-26, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Requirements

Requirements

School districts and COEs: [EC Section 52060\(g\)](#) and [EC Section 52066\(g\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Charter schools: [EC Section 47606.5\(d\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062](#);
 - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see [Education Code Section 52068](#); and
- For charter schools, see [Education Code Section 47606.5](#).

- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
 - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
 - Inclusion of metrics other than the statutorily required metrics
 - Determination of the target outcome on one or more metrics
 - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
 - Inclusion of action(s) or a group of actions
 - Elimination of action(s) or group of actions
 - Changes to the level of proposed expenditures for one or more actions
 - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
 - Analysis of effectiveness of the specific actions to achieve the goal
 - Analysis of material differences in expenditures
 - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
 - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
 - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
 - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
 - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
 - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: [EC Section 42238.024\(b\)\(1\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad Goal

Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.

- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.
- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
 - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
 - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.
- **Required metrics for actions supported by LREBG funds:** To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.
 - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> • Enter the metric number.
Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
 - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
 - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
 - Indicate the school year to which the baseline data applies.
 - The baseline data must remain unchanged throughout the three-year LCAP.
 - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
 - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
 - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- **Note for Charter Schools:** Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
 - **Note for Charter Schools:** Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
 - **Note for Charter Schools:** Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 . Leave blank until then.	Enter information in this box when completing the LCAP for 2026–27 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 and 2026–27 . Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
 - Include a discussion of relevant challenges and successes experienced with the implementation process.
 - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
 - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
 - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
 - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
 - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
 - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
 - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
 - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
 - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
 - Professional development for teachers.
 - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
 - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
 - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
 - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to [EC Section 32526\(d\)](#). For information related to the required needs assessment please see the Program Information tab on the [LREBG](#)

[Program Information](#) web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the [California Statewide System of Support LREBG Resources](#) web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32526(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in [EC Section 32526\(c\)\(2\)](#).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
 - Identify the action as an LREBG action;
 - Include an explanation of how research supports the selected action;
 - Identify the metric(s) being used to monitor the impact of the action; and
 - Identify the amount of LREBG funds being used to support the action.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 CCR Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

Total Projected LCFF Supplemental and/or Concentration Grants

2025-26 Local Control and Accountability Plan for Sage Oak Charter School- South

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.
- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

2025-26 Local Control and Accountability Plan for Sage Oak Charter School- South

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
 - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
 - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to EC Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
 - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
 - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Local Control and Accountability Plan (LCAP) Every Student Succeeds Act (ESSA) Federal Addendum Template

School Year

2025-2026

Date of Board Approval

6/18/2025

LEA Name

Sage Oak Charter School- South

CDS Code:

37-75416-0139378

Link to the LCAP:

(optional)

For which ESSA programs apply to your LEA?

Choose From:

TITLE I, PART A

Improving Basic Programs Operated by
State and Local Educational Agencies

TITLE II, PART A

Supporting Effective Instruction

TITLE IV, PART A

Student Support and Academic
Enrichment Grants

(note: This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)

In the following pages, ONLY complete the sections for the corresponding programs.

Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding. LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

The LEA must address the Strategy and Alignment prompts provided on the following page.

Each provision for each program must be addressed unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template**.

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development**. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sage Oak Charter School strategically utilizes federal funds to supplement and enhance local priorities and initiatives funded with state funds, as detailed in our Local Control and Accountability Plan (LCAP). This strategic allocation ensures that federal resources are effectively supporting specific goals within our school community, aligning closely with our broader educational objectives.

Federal funds under Title I, Part A are targeted toward Goal 1 actions aimed at enhancing College and Career Readiness programs. These funds specifically support socioeconomically disadvantaged students by enhancing academic interventions and providing resources that facilitate both college and career readiness. For Goal 2, Title II, Part A funds are allocated to augment professional development programs, including extensive training for educators on differentiated instruction and effective strategies to engage students with diverse learning needs. This ensures that our teaching staff can implement the educational strategies identified in the LCAP effectively. Additionally, under Goal 3, Title IV, Part A funds align with the focus on leveraging technologies to enhance personalized learning pathways. These funds support the integration of advanced technological tools and programs that support a well-rounded education, including enhancing STEM education, supporting arts programs, and providing comprehensive mental health services.

The rationale behind these specific allocations of federal funds is supported by research that shows targeted interventions in areas such as reading and math can close achievement gaps, particularly for low-income students. Studies consistently indicate a strong correlation between teacher qualifications, their ongoing professional development, and student success. This underscores the necessity of equipping teachers with advanced skills and knowledge. Furthermore, engagement in arts and STEM has been linked to higher academic performance and motivation, while robust mental health support is essential for overall student success and well-being.

By ensuring that federal funds are aligned with the specific goals and actions outlined in our LCAP, Sage Oak Charter School maximizes the impact of these resources. This approach not only meets federal and state compliance requirements but also significantly advances our mission to provide a high-quality, equitable, and comprehensive education to all students, fostering both academic excellence and personal growth.

Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sage Oak Charter School ensures the effective alignment of federal funds with activities funded by state and local funds, and where applicable, across different federal grant programs, through a series of strategic efforts:

We engage in an integrated planning and budgeting process that includes stakeholders from all levels of the organization. This collaborative approach ensures that all sources of funding—federal, state, and local—are considered collectively to create a unified resource allocation strategy. This integrated planning is crucial for aligning the objectives across different funding streams and maximizing the impact of each dollar spent.

In addition, we coordinate activities across different federal grant programs, such as Title I, Title II, and Title IV, to leverage synergies and amplify the effects of these funds. By identifying overlapping goals and complementary activities, resources from these programs can be pooled to support broader educational initiatives, enhancing the cohesion and effectiveness of our efforts.

Our decision-making process is strongly data-driven, relying on regular data collection and analysis to assess the effectiveness of funded programs and to adjust strategies as necessary. This allows us to align federal funds closely with the specific needs identified through state and local assessments, ensuring resources are targeted to areas of greatest need.

Stakeholder engagement is also a cornerstone of our approach. By involving a wide range of stakeholders, including parents, teachers, and community members, in the funding decision-making process, we ensure that the allocation of resources reflects the priorities and needs of our school community, thereby increasing the relevance and impact of the funded programs.

Lastly, continuous monitoring and regular reporting on the use and impact of funds ensure transparency and accountability. This not only helps in making necessary adjustments to align the use of federal, state, and local funds effectively but also ensures that activities across different federal grant programs are well-coordinated and directed toward our common educational goals.

Through these efforts, Sage Oak Charter School fosters a strategic and effective use of all funding sources, ensuring that federal funds not only meet regulatory requirements but also significantly enhance our educational initiatives funded by state and local revenues. This strategic alignment supports our overarching goal of providing high-quality, equitable, and comprehensive education to all students

ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

TITLE I, PART A

Monitoring Student Progress Towards Meeting Challenging State Academic Standards

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(1) (A–D)	1, 2, 4, 7, 8 (<i>as applicable</i>)

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

- (A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
- (B) identifying students who may be at risk for academic failure;
- (C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
- (D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

Overuse in Discipline Practices that Remove Students from the Classroom

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(11)	6 (<i>as applicable</i>)

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

Career Technical and Work-based Opportunities

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(12)(A–B)	2, 4, 7 <i>(as applicable)</i>

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

- (A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
- (B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

TITLE II, PART A

Title II, Part A Activities

ESSA SECTION	STATE PRIORITY ALIGNMENT
2102(b)(2)(A)	1, 2, 4 <i>(as applicable)</i>

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

TITLE III, PART A**Parent, Family, and Community Engagement**

ESSA SECTION	STATE PRIORITY ALIGNMENT
3116(b)(3)	3, 6 (<i>as applicable</i>)

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

TITLE I, PART A

Poverty Criteria

ESSA SECTION(S)	STATE PRIORITY ALIGNMENT
1112(b)(4)	N/A

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Sage Oak utilizes specific poverty criteria under Section 1113, in compliance with the Every Student Succeeds Act (ESSA) provisions detailed in Title I, Part A. This process is part of our annual reporting through the Consolidated Application and Reporting System (CARS), ensuring transparency and adherence to federal guidelines.

As a nonclassroom-based charter school, we operate as a single LEA. We use the percentage of students eligible for the Household Data Collection (HDC) as our primary poverty criterion. Additionally, we consider other socio-economic indicators such as parental income levels. By combining these data points, Sage Oak can more accurately identify student groups that require additional support, allowing for more targeted resource allocation. This method provides a comprehensive measure of socio-economic disadvantage within our community.

This approach not only helps in directing resources to improve educational equity but also aligns with our broader commitment to providing supportive educational environments for all students, particularly those facing economic challenges. Through careful and systematic analysis of poverty indicators, Sage Oak ensures that federal funding is utilized effectively to enhance educational opportunities and outcomes for our most disadvantaged populations.

ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

TITLE I, PART A

Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDE's website (<https://www.cde.ca.gov/pd/ee/peat.asp>) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
 - a. Number of low-income students
 - b. Number of minority students
2. Does the LEA have an educator equity gap –
 - a. If yes, must create a plan which must include root cause analysis of the disparity
 - b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available [here](#).

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

On November 6, 2019, the SBE approved updated definitions for “ineffective” and “out-of-field” teachers to be included in the amended California ESSA Consolidated State Plan.

Term	Definition
Ineffective teacher	<p>An ineffective teacher is any of the following:</p> <ul style="list-style-type: none"> • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or • A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned) • An individual who holds no credential, permit, or authorization to teach in California. <p>Under this definition, teachers with the following limited emergency permits would be considered ineffective:</p>

	<ul style="list-style-type: none"> • Provisional Internship Permits, • Short-Term Staff Permits • Variable Term Waivers <p>Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record</p>
Out-of-field teacher	<p>A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field:</p> <ul style="list-style-type: none"> • General Education Limited Assignment Permit (GELAP) • Special Education Limited Assignment Permit (SELAP) • Short-Term Waivers • Emergency English Learner or Bilingual Authorization Permits <p>Local Assignment Options (except for those made pursuant to the <i>California Code of Regulations</i>, Title 5, Section 80005[b])</p>
Inexperienced Teacher	A teacher who has two or fewer years of teaching experience.
Minority Student	A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic.
Low-Income Student	A student who is eligible to receive Free or Reduced-Price Meals

Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sage Oak implements effective parent and family engagement through strategic communication and collaborative initiatives under Section 1116. We have established a comprehensive engagement policy, developed with direct input from parents, ensuring that strategies are aligned with the needs and expectations of our school community. This policy guides our efforts to provide parents with clear, accessible information about academic standards, assessments, and student progress, empowering them to support their children's education effectively.

Our approach includes providing resources to help parents understand curriculum demands and enhance their ability to assist with learning activities. We also educate our staff on the importance of parental involvement, training them to engage with families as equal partners in education. Through regular updates and transparent communication, we keep parents informed and involved in school activities, decision-making processes, and the development of support plans for students.

Additionally, Sage Oak integrates parent and family engagement strategies with other federal, state, and local programs to enhance the educational support network available to our students.

To meet this requirement, LEAs must provide a description of the following:

ESSA Section 1112(b)(3): how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans

3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

ESSA Section 1112(b)(7): the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))
6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14)).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Sage Oak is dedicated to enhancing engagement through a comprehensive strategy that ensures the active participation of parents and families in their children's education. Our approach aligns with Section 1116 of ESSA, focusing on creating inclusive, supportive, and informative engagement practices that bridge communication gaps between the school and home environments. This alignment is seamlessly integrated with our LCAP educational partner engagement process, ensuring a unified approach to stakeholder involvement.

We have developed a robust parent and family engagement policy in close collaboration with families, ensuring it reflects their needs and perspectives. This policy is approved by the parent advisory committee and distributed annually emphasizing clarity and comprehensibility. To assist parents in understanding the challenging state academic standards, state and local academic assessments, and other educational requirements, we provide informational sessions that are crucial for empowering them to support their children's academic progress effectively.

At Sage Oak, we prioritize making education accessible and engaging. Our staff is trained to value and integrate parental contributions, working with parents as equal partners in the educational process. Our parent involvement programs are coordinated with other federal, state, and local services, enhancing the resources available to our families.

Through regular updates and proactive communication using various platforms—including emails, our website, and social media—we ensure that all families are well-informed and prepared to participate in school activities and decision-making processes. Our engagement strategies are aligned with our LCAP goals, ensuring that parental input is an integral part of our educational planning and evaluation processes.

In aligning these efforts with our LCAP educational partner engagement process, we ensure that parent and family engagement strategies are integral to our broader educational planning. This involves incorporating parent feedback into LCAP development and review, ensuring that our strategic planning reflects the community's voice and needs. By integrating the requirements of Section 1116 into our LCAP process, we enhance the educational experience for all students and foster a supportive community that is deeply involved in our educational mission. This approach is consistent with Sage Oak's educational model, which emphasizes personalized, flexible learning environments that engage and empower our students and their families.

Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA's schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

At Sage Oak, we are committed to providing a wide array of programs under sections 1114 and 1115 of ESSA, designed to support and enhance the educational experiences of all students, including those who are neglected or delinquent. These programs are tailored to meet the diverse needs of our student population and are implemented with the goal of ensuring every student has access to high-quality education that prepares them for success in college, career, and life.

Our schoolwide programs focus on comprehensive strategies that improve the entire educational program, making them more responsive to the needs of our students, particularly those who are at risk of failing academic standards. These programs integrate various funding sources to support initiatives such as enhanced instructional methods, integrated technology, and expanded professional development for teachers. The overarching goal is to raise the academic achievement of all students by improving the entire school's instructional and operational effectiveness.

For students specifically identified as needing extra academic support, we have targeted assistance programs. These programs provide supplementary educational services to help raise the academic achievement of students at risk of failing. Services include personalized tutoring, intervention programs in reading and math, credit recovery courses, and additional support services tailored to the needs of individual students. These targeted efforts focus on students who are the furthest from meeting the standards the school sets for all children.

If applicable, for children living in local institutions for the neglected or delinquent, Sage Oak will offer educational services designed to address their unique educational and social-emotional needs. These services will include tailored curricula that focus on core academic subjects, life skills education, and social-emotional learning opportunities. We will collaborate with local agencies and institutions to ensure that these students receive a coordinated approach to support that includes academic tutoring, mentoring, and counseling services.

The implementation of these programs is closely monitored to assess their effectiveness in improving educational outcomes. Adjustments are made based on ongoing evaluations and feedback from students, parents, and educational staff. By aligning these initiatives with our LCAP goals, Sage Oak ensures that federal funds are used strategically to supplement and enhance our state-funded initiatives, thereby providing a cohesive and integrated educational experience for all students.

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak Charter School, identifying students most in need of services under the targeted assistance school program outlined in Section 1115 is a collaborative and data-driven process, tailored to our independent study model. This

approach involves a broad spectrum of the school community to ensure that the support provided is comprehensively tailored to the individual needs of each student.

The identification process begins with an analysis of academic performance data, including standardized test results, progress in coursework, teacher evaluations, and other relevant assessments. We also consider factors such as engagement levels in learning activities, progress in personalized learning plans, and any social-emotional assessments to ensure a holistic view of each student's needs.

Teachers and school leaders work in consultation with parents, administrators, and specialized instructional support personnel to review and discuss the data collected. This collaborative dialogue is crucial as it helps integrate insights from various perspectives, particularly from parents who provide vital information about their child's learning environment and any external factors influencing their educational experience.

The team prioritizes students based on the urgency and severity of their needs. The criteria for this prioritization include the extent of academic challenges, the potential impact of additional support on the student's educational outcomes, and the capacity of our resources to effectively address these needs.

This collaborative and data-informed approach ensures that the targeted assistance provided is directly responsive to the most pressing needs of our students. By maintaining regular communication and strategic meetings with all stakeholders involved, Sage Oak sustains a dynamic and adaptable support system that enhances educational outcomes and overall student well-being in a non-classroom based setting.

Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we are committed to supporting the educational needs of homeless children and youth through a comprehensive approach that aligns with the McKinney-Vento Homeless Assistance Act. Our strategy ensures that these students have equal access to educational opportunities and are supported in their enrollment, attendance, and academic success.

To address the challenges faced by homeless students, Sage Oak provides specific services designed to remove barriers to their education. This includes ensuring immediate enrollment even when students do not have access to required documents typically necessary for school entry. We provide assistance with obtaining academic and medical records, and we offer school supplies and materials at no cost to the families. We also reserve a portion of our federal funds under Section 1113(c)(3)(A) to support additional services tailored to the needs of homeless students.

In collaboration with services provided under the McKinney-Vento Act, our school appoints a liaison for homeless students to help coordinate these efforts. This liaison works directly with students and families to identify their specific needs and connect them with available resources. They also work with school staff to raise awareness about the challenges faced by homeless students and to train staff on how to best support these students in an educational setting.

Through these coordinated efforts, Sage Oak Charter School strives to create a supportive environment that mitigates the impact of homelessness on students' education, ensuring that all students have the opportunity to succeed and thrive academically.

Student Transitions

ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

N/A

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

- (A) through coordination with institutions of higher education, employers, and other local partners; and
- (B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we recognize the importance of smooth transitions for students moving from middle grades to high school and from high school to postsecondary education. Our strategies are designed to support these critical transitions, ensuring that our students are well-prepared for each new phase of their educational journey.

Key to facilitating the transition from middle grades to high school, Sage Oak ensures our curriculum aligns with the latest academic standards and opportunities. Additionally, we engage with local employers and community partners to provide students with relevant insights into various career paths and the skills required in the workforce, enriching our curriculum with practical applications and real-world relevance.

For students transitioning from high school to postsecondary education or careers, Sage Oak offers robust programs designed to enhance college and career readiness. This includes increased access to early college high school programs, dual or concurrent enrollment opportunities, and comprehensive career counseling services. Our educational advisors play a crucial role in this process, working individually with students to create personalized learning plans that reflect their academic and career goals. These plans are instrumental in navigating course selections, extracurricular activities, and appropriate early college opportunities, tailored to each student's unique interests and skills. Additionally, we are actively increasing our Career and Technical Education (CTE) pathways to include new areas such as Child Development, Sports Medicine, and Arts, Media, and Entertainment (AME), offering students practical and varied career training options that align with their personal interests and market demands. We maintain up-to-date knowledge of University of California (UC) and California State University (CSU) requirements, as well as offerings at community colleges, to guide our students effectively through their educational pathways.

In addition to these transition strategies, our commitment under LCAP Action 1:4 involves developing unified articulation processes that seamlessly transition students through each grade band. This includes integrating critical feedback from graduates and their families to enhance the continuity and relevance of our curriculum, further ensuring our students are prepared for the expectations and challenges of their subsequent educational stages.

Sage Oak's proactive approach ensures that our students are not only aware of their postsecondary options but are also equipped to make informed decisions about their futures. By staying abreast of the latest educational requirements and offerings and implementing these strategies in coordination with higher education institutions, employers, and local partners, we prepare our students to successfully navigate the transitions between educational stages, fully equipped with the knowledge, skills, and qualifications needed to thrive in their chosen paths.

Additional Information Regarding Use of Funds Under this Part

ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

- (A) assist schools in identifying and serving gifted and talented students; and
- (B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

TITLE I, PART D

Description of Program

ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

THIS ESSA PROVISION IS ADDRESSED BELOW:

Formal Agreements

ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the

(A) LEA; and

(B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Comparable Education Program

ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Successful Transitions

ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Educational Needs

ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children

and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Social, Health, and Other Services

ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Postsecondary and Workforce Partnerships

ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Parent and Family Involvement

ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Program Coordination

ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Probation Officer Coordination

ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Individualized Education Program Awareness

ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Alternative Placements

ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE II, PART A

Professional Growth and Improvement

ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

At Sage Oak, our professional development strategy is crafted to support educators at every stage of their careers, ensuring they are well-prepared to meet the diverse needs of our student body. This strategy begins with induction for new teachers and extends through ongoing development opportunities, including participation in professional development conferences such as those provided by the California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC).

We also broaden our educators' training with specialized sessions such as AVID training to bolster college readiness and the UC conference to align with university standards. Also, our staff partakes in targeted professional development focused on special education, ensuring that they are proficient in the latest methodologies and practices.

Our efforts are further supported by Professional Learning Communities (PLCs) which foster collaborative learning and data-driven decision-making. This collaborative environment allows educators to share insights and strategies, enhancing educational practices. Live instruction training is another critical component of our professional development program, ensuring that our educators are proficient in engaging students effectively in a dynamic and increasingly digital learning environment.

In addition, we provide leadership development opportunities for advancement pathways, ensuring a continuous cycle of professional growth and leadership within our school community.

We continually assess the effectiveness of our professional development programs through regular feedback, allowing us to align our strategies closely with both our educational goals and the evolving needs of the school. This comprehensive approach not only supports the professional growth of our educators but also enhances the overall educational experience for our students, ensuring that every member of our school community is equipped to thrive in an ever-changing educational landscape.

Prioritizing Funding

ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

Address these questions:

1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.

2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

Data and Ongoing Consultation to Support Continuous Improvement

ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.
3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
 - a. Teachers
 - b. Principals and other school leaders
 - c. Paraprofessionals (including organizations representing such individuals)
 - d. Specialized instructional support personnel
 - e. Charter school leaders (in a local educational agency that has charter schools)
 - f. Parents
 - g. Community partners
 - h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

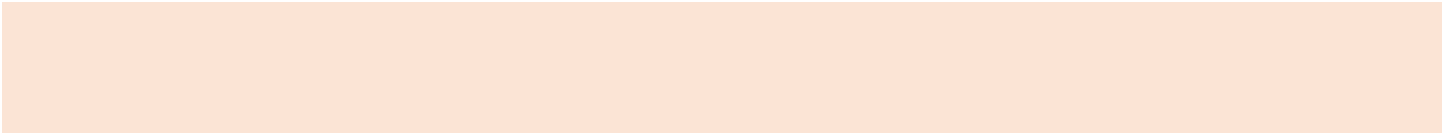
At Sage Oak, our approach to continuous improvement under Title II, Part A, revolves around a robust system of data analysis and ongoing consultation. We integrate Title II activities with our broader educational strategies, ensuring alignment with our holistic educational goals, such as those outlined in our Local Control and Accountability Plan (LCAP).

We employ a data-driven approach to monitor and refine professional development activities. This includes regular analysis of student performance data, staff feedback on professional development sessions, and other relevant metrics. Our Professional Learning Communities (PLCs) play a crucial role here, enabling educators to discuss and implement strategies based on data insights.

Sage Oak conducts evaluations of Title II, Part A activities throughout the academic year. This regular monitoring allows us to stay responsive to the needs of our educators and students, adapting our strategies to maximize effectiveness.

Our consultation process is inclusive, involving a wide range of stakeholders. We engage with teachers, principals, specialized instructional support personnel, and charter school leaders to ensure diverse perspectives are considered. Community partners and organizations with relevant expertise are also involved, enriching our professional development programs.

By systematically integrating feedback and data into our professional development initiatives, Sage Oak Charter School ensures that our educational practices are not only aligned with current needs but are also poised for future success, fulfilling our commitment to continuous improvement.



TITLE III, PART A

Title III Professional Development

ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Enhanced Instructional Opportunities

ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Title III Programs and Activities

ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:

1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
 - are focused on English learners and consistent with the purposes of Title III;
 - enhance the core program; and
 - are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

- (A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
- (B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE IV, PART A

Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

- (A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
- (B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
- (C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
- (D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
- (E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than \$30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

- 1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
- 2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
- 3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
 - a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, our utilization of Title IV, Part A funds is closely aligned with LCAP Goal 3, which focuses on enhancing our technological capabilities to support personalized learning and operational efficiency. We invest in innovative educational technologies, including the development and integration of AI-driven tools. These technologies are designed to tailor learning experiences to individual student needs and streamline administrative processes, thereby enhancing educational outcomes and operational efficacy.

Our objective with these funds is to not only integrate cutting-edge technology into our curriculum but also to ensure these tools effectively support our educational goals. We periodically evaluate the effectiveness of these technological interventions by analyzing student engagement metrics, academic performance data, and operational efficiency indicators. This ongoing assessment helps us refine our technology strategy to ensure it remains aligned with the evolving needs of our students and the broader educational landscape, maintaining our commitment to providing a high-quality, future-ready education.

Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least \$30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for a well-rounded education?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for safety and health of students?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at <https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp>.

Date of LEA's last conducted needs assessment:

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: <https://www.cde.ca.gov/sp/st/>

California Department of Education
February 2022



2025-26 Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Sage Oak Charter School	Krista Woodgrift Superintendent	kwoodgrift@sageoak.education 888-435-4445

Introduction

The California State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area.

This template is intended as a drafting tool and based on the Local Performance Indicator Quick Guide published by CDE in January 2024.

Performance Standards

The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

Local Indicators

The local indicators address the following state priority areas:

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home

- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Implementation of State Academic Standards (LCFF Priority 2)

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Parent and Family Engagement (LCFF Priority 3)

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same public meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

School Climate (LCFF Priority 6)

The LEA administers an annual local climate survey that captures a valid measure of student perceptions of school safety and connectedness, in at least one grade within each grade span(s) the LEA serves (e.g., TK-5, 6-8, 9-12), and reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and to educational partners and the public through the Dashboard.

Access to a Broad Course of Study (LCFF Priority 7)

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Academic Year	Total Teaching FTE	Clear	Out-of-Field	Intern	Ineffective	Incomplete	Unknown	N/A
2022-2023	144	88.8%	10.2%	0.7%	0%	0.1%	0%	0.3%

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0%

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The “Good Repair” Standard (Including Deficiencies and Extreme Deficiencies)	0

Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) – Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics – Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

Implementation of State Academic Standards (LCFF Priority 2)

OPTION 2: Reflection Tool

Recently Adopted Academic Standards and/or Curriculum Frameworks

1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

2. Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

3. Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

Other Adopted Academic Standards

4. Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5	N/A
Career Technical Education					5	
Health Education Content Standards					5	
Physical Education Model Content Standards					5	
Visual and Performing Arts					5	
World Language					5	

Support for Teachers and Administrators

5. Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

Optional Narrative (Limited to 1,500 characters)

6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.

Sage Oak Charter School is committed to implementing California State Board of Education academic standards for all students by ensuring instruction and assessments align with grade-level content and performance standards. Career Technical Education (CTE) is offered through school-designed pathways and partnerships with community colleges. Health education standards are met through textbooks and synchronous or asynchronous courses, aligning with the California Healthy Youth Act when applicable. Physical education standards can be met at home or through approved community providers. The school sets clear expectations for student learning in each grade and subject to ensure readiness for TK–12 and beyond. Ongoing analysis of student data informs professional development, training, and grade-level collaboration, enhancing teacher effectiveness in meeting students' academic needs.

Parental Involvement and Family Engagement (LCFF Priority 3)

Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: ¹

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
 - 1 – Exploration and Research
 - 2 – Beginning Development
 - 3 – Initial Implementation
 - 4 – Full Implementation
 - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

Sections of the Self-Reflection Tool

Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	5
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	5
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	5
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	5

Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Sage Oak Charter School excels in fostering strong relationships between staff and families. Regular communication—both virtual and in-person—keeps families aligned with school goals. Families engage through the Parent Advisory Committee (PAC), Student Advisory Committee (STAC), English Learner Advisory Committee (ELAC), and monthly board meetings, all of which promote two-way communication and transparency. The school also hosts a Fall Parent Summit with sessions on academic and social-emotional topics, strengthening family-school connections. Feedback from surveys informs school planning, reflecting Sage Oak's commitment to collaboration and shared responsibility in student success.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

Sage Oak aims to increase awareness of engagement opportunities. Some families may not fully understand available committees or their roles. Targeted communication efforts will promote PAC, ELAC, and STAC participation. The school will also improve messaging about support services, using Parent Summits and other outreach to highlight resources. These efforts seek to ensure all families feel informed, welcomed, and equipped to participate in their children's education.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

To strengthen engagement among underrepresented families, Sage Oak will increase outreach to recruit diverse voices for advisory groups, including PAC and ELAC. A new Parent Engagement Committee will offer additional opportunities for involvement. Parent Summits will feature sessions tailored to these families, providing a welcoming, low-barrier way to participate. These steps are part of a broader commitment to equity, ensuring all families can contribute to shaping school programs and policies.

Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	5
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	5
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	5
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	5

Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

Sage Oak Charter School has made consistent progress in cultivating strong family-school partnerships to support student success. Bi-monthly teacher PLC meetings provide targeted training in effective communication, learning period facilitation, and collaborative parent engagement strategies. Families benefit from frequent and structured access to teachers through learning period meetings and parent-teacher conferences. These meetings, paired with ongoing communication, ensure that student progress is regularly assessed, resources are shared, and individualized learning goals are developed collaboratively. The school also ensures transparency and access to important legal and procedural information through its website and handbooks, which include Title IX contacts, student rights, and uniform complaint procedures. Parents of students with IEPs are provided the Procedural

Safeguards annually, and translation services are available at IEP meetings to support non-English-speaking families. These practices reflect the school's commitment to accessible, informed, and meaningful partnerships.

- Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

To further strengthen outcomes, the school has set a goal to offer 200 synchronous classes by 2026–27, enhancing student engagement through interactive instruction. This initiative will provide more equitable access to quality learning, addressing varied learning styles and scheduling needs. A key area of focus is increasing math intervention participation for Students with Disabilities (SWD), Socioeconomically Disadvantaged students (SED), and English Learners (EL). Tailored academic supports for these groups aim to close achievement gaps and foster inclusive success. Additionally, there is an ongoing effort to increase EL student participation in core synchronous classes, supporting both language acquisition and academic growth. These areas were identified through educational partner feedback and data analysis as critical to improving outcomes through more robust family and student partnerships.

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Sage Oak is committed to deepening engagement with underrepresented families through multiple strategies identified during its self-reflection process. Teacher professional development is expanding to strengthen live instruction practices, making synchronous learning more accessible and impactful. Additionally, school counselors are leading more live sessions that offer targeted support to address the unique challenges faced by these families. To ensure awareness and participation, the school will enhance its communication efforts through weekly newsletters, social media highlights, and presentations to both existing and newly formed advisory groups. Teachers will also facilitate direct conversations with families to promote available resources and learning opportunities. These efforts aim to build trust, reduce barriers, and create inclusive partnerships that empower every family to actively participate in their student's educational journey.

Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	5
10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	5
11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	5
12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	5

Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

Sage Oak Charter School continues to strengthen its decision-making process by actively engaging educational partners across various platforms. In 2024–25, the school operated three advisory committees: the Parent Advisory Committee (PAC), English Learner Advisory Committee (ELAC), and newly launched Student Advisory Committee (STAC). These groups meet consistently to reflect on student needs and school priorities. Additional input is collected through annual and mid-year family surveys, live and recorded trainings, and regular interaction between families and teachers. The school also hosted a virtual parent summit to expand opportunities for family engagement. Events such as field trips, socials, college tours, and graduation ceremonies further promote communication and shared decision-making. This multifaceted approach ensures educational partners are informed, included, and heard throughout the year.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

For 2025–26, the school is focused on increasing family participation in decision-making groups by launching a new Parent Engagement Committee. This committee will serve as another forum for families to provide feedback and influence planning of regular parent engagement opportunities. Earlier and more intentional recruitment for PAC and ELAC will also be emphasized to increase awareness and engagement. The Student Advisory Committee, now in place, provides students a dedicated voice in school improvement efforts. Together, these expanded opportunities aim to improve equity and inclusion in the input-gathering process.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

To improve participation among underrepresented families, Sage Oak will implement targeted strategies aimed at accessibility, inclusion, and outreach. The school will continue its multi-channel communication approach—email, social media, website updates, and teacher-family conversations—to keep families informed about surveys, advisory meetings, and public board sessions. Staff will proactively invite families from diverse backgrounds to participate in the new Parent Engagement Committee, as well as in PAC, ELAC, and parent summits. Presentations at school events and onboarding sessions will also highlight how families can get involved in decision-making. These steps will help foster a culture of belonging and ensure a broader range of voices guide the school's direction.

School Climate (LCFF Priority 6)

Introduction

The initial design of the Local Control Funding Formula recognized the critical role that positive school conditions and climate play in advancing student performance and equity. This recognition is grounded in a research base demonstrating that a positive school climate directly impacts indicators of success such as increased teacher retention, lower dropout rates, decreased incidences of violence, and higher student achievement.

In order to support comprehensive planning, LEAs need access to current data. The measurement of school climate provides LEAs with critical data that can be used to track progress in school climate for purposes of continuous improvement, and the ability to identify needs and implement changes to address local needs.

Introduction

LEAs are required, at a minimum, to annually administer a local climate survey. The survey must:

- Capture a valid measure of student perceptions of school safety and connectedness in at least one grade within each grade span the LEA serves (e.g. TK-5, 6-8, 9-12); and

- At a minimum, report disaggregated data by student groups identified in California Education Code 52052, when such data is available as part of the local school climate survey.

Based on the analysis of local data, including the local climate survey data, LEAs are to respond to the following three prompts. Each prompt response is limited to 3,000 characters. An LEA may provide hyperlink(s) to other documents as necessary within each prompt:

Prompt 1 (DATA): Describe the local climate survey data, including available data disaggregated by student groups. LEAs using surveys that provide an overall score, such as the California Healthy Kids Survey, are encouraged to report the overall score for all students as well as available student group scores. Responses may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

Sage Oak Charter School annually administers a comprehensive local climate survey to parents, students, and staff to assess perceptions of school safety, connection, and engagement. The most recent data reflect strong outcomes across all stakeholder groups, with particular strengths in areas tied to safety, respectful environments, and curriculum quality.

Parent Survey Highlights:

98% of parents believe the curriculum and resources provide a robust, well-rounded educational experience.
90% feel connected to the school's mission of empowering students to lead purposeful and productive lives.
85% feel Sage Oak effectively provides opportunities for involvement and input, reflecting healthy engagement levels.
90% agree the school prioritizes safety, value, and respect.
93% are informed about student social-emotional and mental health support resources.

Staff Survey Highlights:

94% believe the school's curriculum is rigorous and well-rounded.
98% of teachers and EAs feel equipped to prepare students for the next grade band.
93% feel English Learners have adequate access to academic supports.
95% feel connected to the school's mission.
97% believe their voices are valued in decision-making.
99% affirm the school prioritizes safety, value, and respect.
97% feel professionally equipped through PD offerings.
94% are informed of student support resources.

Student Survey Highlights:

97% report that curriculum and resources are challenging and well-rounded.
89% feel connected to the school's mission.
86% feel they are given opportunities for input and involvement.
95% agree the school prioritizes a safe, respectful learning environment.
90% are aware of available mental health and social-emotional supports.

Prompt 2 (MEANING): Describe key learnings, including identified needs and areas of strength determined through the analysis of data described in Prompt 1, including the available data disaggregated by student group.

The analysis of Sage Oak's local climate survey reveals clear strengths in school climate, particularly around stakeholder confidence in academic quality, student safety, staff preparedness, and alignment with the school's mission. Across all groups—parents, staff, and students—responses reflect a deeply supportive, respectful, and engaging educational environment.

Key Areas of Strength:

Academic Confidence and Rigor: A significant majority of respondents across all groups indicated satisfaction with the curriculum's quality—98% of parents, 94% of staff, and 97% of students. This reflects a shared confidence that Sage Oak provides a challenging and comprehensive educational experience.

Mission Alignment: 90% of parents, 95% of staff, and 89% of students feel connected to Sage Oak's mission of empowering students to embrace their unique potential. The consistency across groups demonstrates a strong cultural foundation and clarity of purpose.

Safety and Respect: High agreement levels—90% (parents), 99% (staff), and 95% (students)—indicate that Sage Oak fosters a safe and respectful learning environment, a key factor in promoting student well-being and engagement.

Mental Health and Support Awareness: Over 90% of all groups reported awareness of social-emotional and mental health supports, affirming that communication about these services is reaching stakeholders effectively.

Staff Preparedness: Staff responses demonstrate strong confidence in their professional readiness, with 97% affirming that PD equipped them to succeed in their roles.

Identified Needs and Growth Opportunities:

Engagement and Input: While still positive overall, scores related to opportunities for input and involvement were slightly lower: 85% of parents and 86% of students agreed their voices were heard, compared to 97% of staff. This gap suggests an opportunity to deepen engagement efforts, especially for families and students who may not yet feel fully empowered to contribute to decision-making.

Student Connection to Mission: At 89%, student connection to the school's mission is strong, but slightly lower than that of parents and staff. Continued efforts to provide students with authentic, mission-aligned experiences—particularly through student voice initiatives, advisory roles, and co-curricular activities—could increase ownership and connection.

These insights underscore that while Sage Oak's school climate is overwhelmingly positive, intentional efforts to strengthen two-way communication and input opportunities—especially for families and students—will enhance inclusion and foster deeper connection.

Prompt 3 (USE): Describe any changes to existing plans, policies, or procedures that the LEA determines necessary in order to address areas of need identified through the analysis of local data and the identification of key learnings. Include any revisions, decisions, or actions the LEA has, or will, implement for continuous improvement purposes.

Based on key findings from the local climate survey, Sage Oak Charter School will implement several targeted strategies to address areas of need and build on existing strengths related to school climate and stakeholder engagement.

Enhancing Student and Family Voice in Decision-Making

To address the slight discrepancy in perceived opportunities for involvement—particularly among parents (85%) and students (86%)—the school will expand structured input opportunities in 2025–26. This includes forming a new Parent Engagement Committee designed to complement existing advisory bodies (PAC, ELAC, and STAC), ensuring broader representation and more regular input from families who may not be engaged in current forums. These committees will continue to help elevate voices that were previously underrepresented in decision-making processes.

Deepening Student Mission Connection

While 89% of students report feeling connected to the school's mission, Sage Oak will take steps to reinforce this connection through intentional student experiences. Advisors and counselors will embed mission-aligned reflections in academic planning meetings, and student-centered activities—such as leadership opportunities, service projects, and career exploration—will be expanded to help students see how their learning aligns with the broader purpose of leading purposeful and productive lives.

Strengthening Communication Around Input Channels

Survey data suggests that while Sage Oak offers many pathways for engagement, not all stakeholders are fully aware of them. To address this, the school will implement a more visible communication campaign—through newsletters, social media, onboarding, and an additional virtual parent summit—outlining specific ways families and students can participate in shaping school decisions. Staff will also be encouraged to personally invite families to participate in upcoming meetings and surveys, especially those from underrepresented groups.

Sustaining and Building on Areas of Strength

High levels of satisfaction in safety (90–99%), professional development (97%), and awareness of support services (90%+) indicate well-established systems worth preserving. Existing practices around staff development, mental health communication, and academic support will continue, with minor enhancements based on stakeholder feedback.

These actions, rooted in the climate survey results, reflect Sage Oak's ongoing commitment to inclusivity, connection, and continuous improvement across all dimensions of school climate.

Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

Sage Oak Charter School uses personalized educational planning as a key tool to ensure all students—across grade spans, student groups, and those with exceptional needs—have access to and are enrolled in a broad course of study. Each student's plan is collaboratively developed by the supervising teacher or educational advisor (EA), parent/guardian, and student. As needed, the Counselor, English Learner (EL) Coordinator, Homeless and Foster Youth Liaison, 504/SST Coordinator, and Special Education Case Managers contribute to the planning process to ensure equitable access and alignment with each student's unique needs.

The personalized plan includes a course of study selected from a school-approved list of curriculum options that are standards-aligned and meet graduation requirements. Plans are regularly reviewed and updated to reflect students' evolving interests, goals, and academic progress. This process allows the school to monitor course access and

participation for unduplicated student groups and individuals with exceptional needs, ensuring that all students are supported in pursuing a full, diverse academic experience.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

Sage Oak Charter School ensures all students have access to, and are enrolled in, a broad course of study through personalized academic planning, continuous monitoring, and support from a multidisciplinary team. Teachers and educational advisors (EAs) regularly review course enrollment and academic progress, using both performance data and anecdotal evidence to assess alignment with students' interests, abilities, and needs. Plans are adjusted as needed in collaboration with the Counselor, EL Coordinator, Homeless and Foster Youth Liaison, 504/SST Coordinator, and Special Education Case Managers to ensure equitable access for unduplicated student groups and students with exceptional needs.

All students select their curriculum from a school-approved, standards-aligned list that spans core subjects and electives across grade levels. Because Sage Oak operates as one independent study based school without multiple physical sites, there are no differences in course access across locations. Over time, the school has expanded its course offerings—including increased synchronous classes and electives—to further support diverse learning styles and academic interests. This ongoing, student-centered process allows for broad, individualized access to educational opportunities for all learners.

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

A primary barrier to providing full access to a broad course of study—particularly in Career Technical Education (CTE)—has been the absence of a physical school site, which limits hands-on instructional opportunities. To address this, Sage Oak has partnered with local community colleges to promote dual enrollment, enabling students to access in-person CTE resources and specialized training not available in a virtual setting.

Additionally, the school has expanded its catalog of CTE pathways that are compatible with online learning. These include courses in animation, visual arts, child development, business, sports medicine and information technology, which provide students with meaningful, career-aligned experiences within a virtual framework. To further reduce barriers, Sage Oak is investing in professional development to equip teachers with the tools and knowledge to effectively promote CTE options to students during academic planning. This ensures more students—especially those in unduplicated student groups—are aware of, and encouraged to pursue, available CTE pathways, despite the challenges posed by the independent study model.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

By the end of the 2026-27 academic year, we plan to offer 200 Career Technical Education (CTE) aligned courses across K-12, supporting career readiness with practical skills and industry knowledge. To enhance college and career indicators, we aim to increase the CCI by 2% annually, focusing on metrics that reflect successful preparation for post-secondary pathways. Further, we are encouraging an increase in student enrollment in A-G courses, aiming to ensure that more students are eligible for UC and CSU admissions. Alongside this, we are dedicated to maintaining a high standard of excellence in advanced coursework, with a target of keeping our AP exam pass rate at 72% or higher. These initiatives are designed to ensure comprehensive access to a diverse and challenging curriculum that prepares students for a variety of future academic and career paths.

Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

Assess the degree of implementation of coordinated service program components for foster youth in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Services	1	2	3	4	5
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					

Coordinating Services	1	2	3	4	5
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					



2025-26 Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Sage Oak Charter School- Keppel	Krista Woodgrift Superintendent	888-435-4445 888-435-4445

Introduction

The California State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area.

This template is intended as a drafting tool and based on the Local Performance Indicator Quick Guide published by CDE in January 2024.

Performance Standards

The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

Local Indicators

The local indicators address the following state priority areas:

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Implementation of State Academic Standards (LCFF Priority 2)

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Parent and Family Engagement (LCFF Priority 3)

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same public meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

School Climate (LCFF Priority 6)

The LEA administers an annual local climate survey that captures a valid measure of student perceptions of school safety and connectedness, in at least one grade within each grade span(s) the LEA serves (e.g., TK-5, 6-8, 9-12), and reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and to educational partners and the public through the Dashboard.

Access to a Broad Course of Study (LCFF Priority 7)

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Academic Year	Total Teaching FTE	Clear	Out-of-Field	Intern	Ineffective	Incomplete	Unknown	N/A
2021-2022	44.6	91.6%	7.8%	0%	0%	0.1%	0%	.5%

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0%

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The “Good Repair” Standard (Including Deficiencies and Extreme Deficiencies)	0

Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) – Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics – Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

Implementation of State Academic Standards (LCFF Priority 2)

OPTION 2: Reflection Tool

Recently Adopted Academic Standards and/or Curriculum Frameworks

1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

2. Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

3. Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

Other Adopted Academic Standards

4. Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5	N/A
Career Technical Education					5	
Health Education Content Standards					5	
Physical Education Model Content Standards					5	
Visual and Performing Arts					5	
World Language					5	

Support for Teachers and Administrators

5. Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

Optional Narrative (Limited to 1,500 characters)

6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.

Sage Oak Charter School is committed to implementing California State Board of Education academic standards for all students by ensuring instruction and assessments align with grade-level content and performance standards. Career Technical Education (CTE) is offered through school-designed pathways and partnerships with community colleges. Health education standards are met through textbooks and synchronous or asynchronous courses, aligning with the California Healthy Youth Act when applicable. Physical education standards can be met at home or through approved community providers. The school sets clear expectations for student learning in each grade and subject to ensure readiness for TK–12 and beyond. Ongoing analysis of student data informs professional development, training, and grade-level collaboration, enhancing teacher effectiveness in meeting students' academic needs.

Parental Involvement and Family Engagement (LCFF Priority 3)

Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: ¹

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
 - 1 – Exploration and Research
 - 2 – Beginning Development
 - 3 – Initial Implementation
 - 4 – Full Implementation
 - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

Sections of the Self-Reflection Tool

Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	5
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	5
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	5
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	5

Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Sage Oak Charter School excels in fostering strong relationships between staff and families. Regular communication—both virtual and in-person—keeps families aligned with school goals. Families engage through the Parent Advisory Committee (PAC), Student Advisory Committee (STAC) and monthly board meetings, all of which promote two-way communication and transparency. The school also hosts a Fall Parent Summit with sessions on academic and social-emotional topics, strengthening family-school connections. Feedback from surveys informs school planning, reflecting Sage Oak's commitment to collaboration and shared responsibility in student success.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

Sage Oak aims to increase awareness of engagement opportunities. Some families may not fully understand available committees or their roles. Targeted communication efforts will promote PAC and STAC participation. The school will also improve messaging about support services, using Parent Summits and other outreach to highlight resources. These efforts seek to ensure all families feel informed, welcomed, and equipped to participate in their children's education.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

To strengthen engagement among underrepresented families, Sage Oak will increase outreach to recruit diverse voices for advisory committees. A new Parent Engagement Committee will offer additional opportunities for involvement. Parent Summits will feature sessions tailored to these families, providing a welcoming, low-barrier way to participate. These steps are part of a broader commitment to equity, ensuring all families can contribute to shaping school programs and policies.

Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	5
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	5
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	5
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	5

Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

Sage Oak Charter School has made consistent progress in cultivating strong family-school partnerships to support student success. Bi-monthly teacher PLC meetings provide targeted training in effective communication, learning period facilitation, and collaborative parent engagement strategies. Families benefit from frequent and structured access to teachers through learning period meetings and parent-teacher conferences. These meetings, paired with ongoing communication, ensure that student progress is regularly assessed, resources are shared, and individualized learning goals are developed collaboratively. The school also ensures transparency and access to important legal and procedural information through its website and handbooks, which include Title IX contacts, student rights, and uniform complaint procedures. Parents of students with IEPs are provided the Procedural

Safeguards annually, and translation services are available at IEP meetings to support non-English-speaking families. These practices reflect the school's commitment to accessible, informed, and meaningful partnerships.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

To further strengthen outcomes, the school has set a goal to offer 200 synchronous classes by 2026–27, enhancing student engagement through interactive instruction. This initiative will provide more equitable access to quality learning, addressing varied learning styles and scheduling needs. A key area of focus is increasing math intervention participation for Students with Disabilities (SWD), Socioeconomically Disadvantaged students (SED), and English Learners (EL). Tailored academic supports for these groups aim to close achievement gaps and foster inclusive success. Additionally, there is an ongoing effort to increase EL student participation in core synchronous classes, supporting both language acquisition and academic growth. These areas were identified through educational partner feedback and data analysis as critical to improving outcomes through more robust family and student partnerships.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Sage Oak is committed to deepening engagement with underrepresented families through multiple strategies identified during its self-reflection process. Teacher professional development is expanding to strengthen live instruction practices, making synchronous learning more accessible and impactful. Additionally, school counselors are leading more live sessions that offer targeted support to address the unique challenges faced by these families. To ensure awareness and participation, the school will enhance its communication efforts through weekly newsletters, social media highlights, and presentations to both existing and newly formed advisory groups. Teachers will also facilitate direct conversations with families to promote available resources and learning opportunities. These efforts aim to build trust, reduce barriers, and create inclusive partnerships that empower every family to actively participate in their student's educational journey.

Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	5
10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	5
11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	5
12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	5

Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

Sage Oak Charter School continues to strengthen its decision-making process by actively engaging educational partners across various platforms. In 2024–25, the school operated two advisory committees: the Parent Advisory Committee (PAC) and newly launched Student Advisory Committee (STAC). These groups meet consistently to reflect on student needs and school priorities. Additional input is collected through annual and mid-year family surveys, live and recorded trainings, and regular interaction between families and teachers. The school also hosted a virtual parent summit to expand opportunities for family engagement. Events such as field trips, socials, college tours, and graduation ceremonies further promote communication and shared decision-making. This multifaceted approach ensures educational partners are informed, included, and heard throughout the year.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

For 2025–26, the school is focused on increasing family participation in formal decision-making groups by launching a new Parent Engagement Committee. This committee will serve as another forum for families to provide feedback and influence planning of regular parent engagement events. Earlier and more intentional recruitment for PAC will also be emphasized to increase awareness and engagement. The Student Advisory Committee, now in place, provides students a dedicated voice in school improvement efforts. Together, these expanded opportunities aim to improve equity and inclusion in the input-gathering process.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

To improve participation among underrepresented families, Sage Oak will implement targeted strategies aimed at accessibility, inclusion, and outreach. The school will continue its multi-channel communication approach—email, social media, website updates, and teacher-family conversations—to keep families informed about surveys, advisory meetings, and public board sessions. Staff will proactively invite families from diverse backgrounds to participate in the new Parent Engagement Committee, as well as in PAC and parent summits. Presentations at school events and onboarding sessions will also highlight how families can get involved in decision-making. These steps will help foster a culture of belonging and ensure a broader range of voices guide the school's direction.

School Climate (LCFF Priority 6)

Introduction

The initial design of the Local Control Funding Formula recognized the critical role that positive school conditions and climate play in advancing student performance and equity. This recognition is grounded in a research base demonstrating that a positive school climate directly impacts indicators of success such as increased teacher retention, lower dropout rates, decreased incidences of violence, and higher student achievement.

In order to support comprehensive planning, LEAs need access to current data. The measurement of school climate provides LEAs with critical data that can be used to track progress in school climate for purposes of continuous improvement, and the ability to identify needs and implement changes to address local needs.

Introduction

LEAs are required, at a minimum, to annually administer a local climate survey. The survey must:

- Capture a valid measure of student perceptions of school safety and connectedness in at least one grade within each grade span the LEA serves (e.g. TK-5, 6-8, 9-12); and

- At a minimum, report disaggregated data by student groups identified in California Education Code 52052, when such data is available as part of the local school climate survey.

Based on the analysis of local data, including the local climate survey data, LEAs are to respond to the following three prompts. Each prompt response is limited to 3,000 characters. An LEA may provide hyperlink(s) to other documents as necessary within each prompt:

Prompt 1 (DATA): Describe the local climate survey data, including available data disaggregated by student groups. LEAs using surveys that provide an overall score, such as the California Healthy Kids Survey, are encouraged to report the overall score for all students as well as available student group scores. Responses may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

Sage Oak Charter School annually administers a comprehensive local climate survey to parents, students, and staff to assess perceptions of school safety, connection, and engagement. The most recent data reflect strong outcomes across all stakeholder groups, with particular strengths in areas tied to safety, respectful environments, and curriculum quality.

Parent Survey Highlights:

97% of parents believe the curriculum and resources provide a robust, well-rounded educational experience.
 92% feel connected to the school's mission of empowering students to lead purposeful and productive lives.
 87% feel Sage Oak effectively provides opportunities for involvement and input, reflecting healthy engagement levels.
 99% agree the school prioritizes safety, value, and respect.
 91% are informed about student social-emotional and mental health support resources.

Staff Survey Highlights:

94% believe the school's curriculum is rigorous and well-rounded.
 98% of teachers and EAs feel equipped to prepare students for the next grade band.
 93% feel English Learners have adequate access to academic supports.
 95% feel connected to the school's mission.
 97% believe their voices are valued in decision-making.
 99% affirm the school prioritizes safety, value, and respect.
 97% feel professionally equipped through PD offerings.
 94% are informed of student support resources.

Student Survey Highlights:

94% report that curriculum and resources are challenging and well-rounded.
 89% feel connected to the school's mission.
 92% feel they are given opportunities for input and involvement.
 100% agree the school prioritizes a safe, respectful learning environment.
 90% are aware of available mental health and social-emotional supports.

Prompt 2 (MEANING): Describe key learnings, including identified needs and areas of strength determined through the analysis of data described in Prompt 1, including the available data disaggregated by student group.

The analysis of Sage Oak's local climate survey reveals clear strengths in school climate, particularly around stakeholder confidence in academic quality, student safety, staff preparedness, and alignment with the school's mission. Across all groups—parents, staff, and students—responses reflect a deeply supportive, respectful, and engaging educational environment.

Key Areas of Strength:

Academic Confidence and Rigor: High agreement across all groups—97% of parents, 94% of staff, and 94% of students—affirms consistent access to a rigorous, well-rounded curriculum.

Mission Alignment: 92% of parents, 95% of staff, and 89% of students report feeling connected to the school's mission. While all groups show strong alignment, ongoing efforts to deepen student connection to this mission will remain a priority.

Safety and Respect: Ratings were outstanding, with 99% of parents, 99% of staff, and 100% of students affirming the school prioritizes safety and respectful learning environments.

Mental Health and Support Awareness: Across all groups, over 90% are aware of available mental health and social-emotional supports—91% (parents), 94% (staff), and 90% (students).

Staff Preparedness: Staff feel well-prepared, with 97% indicating that professional development equipped them for their roles and 98% feeling confident preparing students for grade transitions.

Identified Needs and Growth Opportunities:

Family Engagement: At 92%, student confidence in having a voice in school decisions has increased since previous years, showing successful implementation of initiatives like the Student Advisory Committee. Continued reinforcement of these structures will help maintain and build upon this momentum.

Student Voice: At 89%, student connection to the school's mission is strong, but slightly lower than that of parents and staff. Continued efforts to provide students with authentic, mission-aligned experiences—particularly through student voice initiatives, advisory roles, and co-curricular activities—could increase ownership and connection.

Equity in Representation: While overall ratings are high, ongoing monitoring is needed to ensure underrepresented families and students remain equally informed, supported, and involved in school life and governance.

Prompt 3 (USE): Describe any changes to existing plans, policies, or procedures that the LEA determines necessary in order to address areas of need identified through the analysis of local data and the identification of key learnings. Include any revisions, decisions, or actions the LEA has, or will, implement for continuous improvement purposes.

Based on key findings from the local climate survey, Sage Oak Charter School will implement several targeted strategies to address areas of need and build on existing strengths related to school climate and stakeholder engagement.

Increasing Family Participation and Input

With 87% of parents affirming involvement opportunities, the school recognizes the importance of expanding inclusive, accessible input channels. For 2025–26, Sage Oak will establish a Parent Engagement Committee to create more touchpoints for families, especially those not already involved in another committee. Outreach will include personal invitations, onboarding presentations, and multilingual communication to ensure broader participation.

Strengthening Student Connection to Mission

Despite high overall mission alignment, students (89%) trail parents and staff slightly. To bridge this gap, the school will integrate reflective mission-based discussions in academic planning and advisory activities. Leadership roles, service projects, and peer-driven events will be expanded to foster deeper personal connections to the school's vision.

Sustaining Core Strengths

Exceptional ratings in safety (99–100%), curriculum satisfaction (94–97%), and support awareness (90%+) demonstrate that Sage Oak's foundational practices are effective and trusted. The school will maintain current practices around social-emotional learning, staff professional development, and academic rigor, with minor adjustments based on annual feedback.

These refinements reflect Sage Oak's commitment to continuous improvement through meaningful collaboration and data-informed action.

Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

Sage Oak Charter School uses personalized educational planning as a key tool to ensure all students—across grade spans, student groups, and those with exceptional needs—have access to and are enrolled in a broad course of study. Each student's plan is collaboratively developed by the supervising teacher or educational advisor (EA), parent/guardian, and student. As needed, the Counselor, English Learner (EL) Coordinator, Homeless and Foster Youth Liaison, 504/SST Coordinator, and Special Education Case Managers contribute to the planning process to ensure equitable access and alignment with each student's unique needs.

The personalized plan includes a course of study selected from a school-approved list of curriculum options that are standards-aligned and meet graduation requirements. Plans are regularly reviewed and updated to reflect students' evolving interests, goals, and academic progress. This process allows the school to monitor course access and participation for unduplicated student groups and individuals with exceptional needs, ensuring that all students are supported in pursuing a full, diverse academic experience.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

Sage Oak Charter School ensures all students have access to, and are enrolled in, a broad course of study through personalized academic planning, continuous monitoring, and support from a multidisciplinary team. Teachers and educational advisors (EAs) regularly review course enrollment and academic progress, using both performance data and anecdotal evidence to assess alignment with students' interests, abilities, and needs. Plans are adjusted as needed in collaboration with the Counselor, EL Coordinator, Homeless and Foster Youth Liaison, 504/SST Coordinator, and Special Education Case Managers to ensure equitable access for unduplicated student groups and students with exceptional needs.

All students select their curriculum from a school-approved, standards-aligned list that spans core subjects and electives across grade levels. Because Sage Oak operates as one independent study based school without multiple physical sites, there are no differences in course access across locations. Over time, the school has expanded its course offerings—including increased synchronous classes and electives—to further support diverse learning styles and academic interests. This ongoing, student-centered process allows for broad, individualized access to educational opportunities for all learners.

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

A primary barrier to providing full access to a broad course of study—particularly in Career Technical Education (CTE)—has been the absence of a physical school site, which limits hands-on instructional opportunities. To address this, Sage Oak has partnered with local community colleges to promote dual enrollment, enabling students to access in-person CTE resources and specialized training not available in a virtual setting.

Additionally, the school has expanded its catalog of CTE pathways that are compatible with online learning. These include courses in animation, visual arts, child development, business, sports medicine and information technology, which provide students with meaningful, career-aligned experiences within a virtual framework. To further reduce barriers, Sage Oak is investing in professional development to equip teachers with the tools and knowledge to effectively promote CTE options to students during academic planning. This ensures more students—especially those in unduplicated student groups—are aware of, and encouraged to pursue, available CTE pathways, despite the challenges posed by the independent study model.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

By the end of the 2026-27 academic year, we plan to offer 200 Career Technical Education (CTE) aligned courses across K-12, supporting career readiness with practical skills and industry knowledge. To enhance college and career indicators, we aim to increase the CCI by 2% annually, focusing on metrics that reflect successful preparation for post-secondary pathways. Further, we are encouraging an increase in student enrollment in A-G courses, aiming to ensure that more students are eligible for UC and CSU admissions. Alongside this, we are dedicated to maintaining a high standard of excellence in advanced coursework, with a target of keeping our AP exam pass rate at 72% or higher. These initiatives are designed to ensure comprehensive access to a diverse and challenging curriculum that prepares students for a variety of future academic and career paths.

Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

Assess the degree of implementation of coordinated service program components for foster youth in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Services	1	2	3	4	5
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					

Coordinating Services	1	2	3	4	5
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					



2025-26 Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Sage Oak Charter School- South	Krista Woodgrift Superintendent	kwoodgrift@sageoak.education 888-435-4445

Introduction

The California State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area.

This template is intended as a drafting tool and based on the Local Performance Indicator Quick Guide published by CDE in January 2024.

Performance Standards

The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

Local Indicators

The local indicators address the following state priority areas:

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home

- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Implementation of State Academic Standards (LCFF Priority 2)

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Parent and Family Engagement (LCFF Priority 3)

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same public meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

School Climate (LCFF Priority 6)

The LEA administers an annual local climate survey that captures a valid measure of student perceptions of school safety and connectedness, in at least one grade within each grade span(s) the LEA serves (e.g., TK-5, 6-8, 9-12), and reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and to educational partners and the public through the Dashboard.

Access to a Broad Course of Study (LCFF Priority 7)

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Academic Year	Total Teaching FTE	Clear	Out-of-Field	Intern	Ineffective	Incomplete	Unknown	N/A
2021-2022	46.2	87.1%	10.8%	0%	.9%	1.1%	0%	.2%

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0%

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The “Good Repair” Standard (Including Deficiencies and Extreme Deficiencies)	0

Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) – Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics – Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

Implementation of State Academic Standards (LCFF Priority 2)

OPTION 2: Reflection Tool

Recently Adopted Academic Standards and/or Curriculum Frameworks

1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

2. Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

3. Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

Other Adopted Academic Standards

4. Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5	N/A
Career Technical Education					5	
Health Education Content Standards					5	
Physical Education Model Content Standards					5	
Visual and Performing Arts					5	
World Language					5	

Support for Teachers and Administrators

5. Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

Optional Narrative (Limited to 1,500 characters)

6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.

Sage Oak Charter School is committed to implementing California State Board of Education academic standards for all students by ensuring instruction and assessments align with grade-level content and performance standards. Career Technical Education (CTE) is offered through school-designed pathways and partnerships with community colleges. Health education standards are met through textbooks and synchronous or asynchronous courses, aligning with the California Healthy Youth Act when applicable. Physical education standards can be met at home or through approved community providers. The school sets clear expectations for student learning in each grade and subject to ensure readiness for TK–12 and beyond. Ongoing analysis of student data informs professional development, training, and grade-level collaboration, enhancing teacher effectiveness in meeting students' academic needs.

Parental Involvement and Family Engagement (LCFF Priority 3)

Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: ¹

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
 - 1 – Exploration and Research
 - 2 – Beginning Development
 - 3 – Initial Implementation
 - 4 – Full Implementation
 - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

Sections of the Self-Reflection Tool

Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	5
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	5
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	5
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	5

Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Sage Oak Charter School excels in fostering strong relationships between staff and families. Regular communication—both virtual and in-person—keeps families aligned with school goals. Families engage through the Parent Advisory Committee (PAC), Student Advisory Committee (STAC) and monthly board meetings, all of which promote two-way communication and transparency. The school also hosts a Fall Parent Summit with sessions on academic and social-emotional topics, strengthening family-school connections. Feedback from surveys informs school planning, reflecting Sage Oak's commitment to collaboration and shared responsibility in student success.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

Sage Oak aims to increase awareness of engagement opportunities. Some families may not fully understand available committees or their roles. Targeted communication efforts will promote PAC and STAC participation. The school will also improve messaging about support services, using Parent Summits and other outreach to highlight resources. These efforts seek to ensure all families feel informed, welcomed, and equipped to participate in their children's education.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

To strengthen engagement among underrepresented families, Sage Oak will increase outreach to recruit diverse voices for advisory groups, including PAC. A new Parent Engagement Committee will offer additional opportunities for involvement. Parent Summits will feature sessions tailored to these families, providing a welcoming, low-barrier way to participate. These steps are part of a broader commitment to equity, ensuring all families can contribute to shaping school programs and policies.

Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	5
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	5
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	5
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	5

Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

Sage Oak Charter School has made consistent progress in cultivating strong family-school partnerships to support student success. Bi-monthly teacher PLC meetings provide targeted training in effective communication, learning period facilitation, and collaborative parent engagement strategies. Families benefit from frequent and structured access to teachers through learning period meetings and parent-teacher conferences. These meetings, paired with ongoing communication, ensure that student progress is regularly assessed, resources are shared, and individualized learning goals are developed collaboratively. The school also ensures transparency and access to important legal and procedural information through its website and handbooks, which include Title IX contacts, student rights, and uniform complaint procedures. Parents of students with IEPs are provided the Procedural

Safeguards annually, and translation services are available at IEP meetings to support non-English-speaking families. These practices reflect the school's commitment to accessible, informed, and meaningful partnerships.

- Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

To further strengthen outcomes, the school has set a goal to offer 200 synchronous classes by 2026–27, enhancing student engagement through interactive instruction. This initiative will provide more equitable access to quality learning, addressing varied learning styles and scheduling needs. A key area of focus is increasing math intervention participation for Students with Disabilities (SWD), Socioeconomically Disadvantaged students (SED), and English Learners (EL). Tailored academic supports for these groups aim to close achievement gaps and foster inclusive success. Additionally, there is an ongoing effort to increase EL student participation in core synchronous classes, supporting both language acquisition and academic growth. These areas were identified through educational partner feedback and data analysis as critical to improving outcomes through more robust family and student partnerships.

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Sage Oak is committed to deepening engagement with underrepresented families through multiple strategies identified during its self-reflection process. Teacher professional development is expanding to strengthen live instruction practices, making synchronous learning more accessible and impactful. Additionally, school counselors are leading more live sessions that offer targeted support to address the unique challenges faced by these families. To ensure awareness and participation, the school will enhance its communication efforts through weekly newsletters, social media highlights, and presentations to both existing and newly formed advisory groups. Teachers will also facilitate direct conversations with families to promote available resources and learning opportunities. These efforts aim to build trust, reduce barriers, and create inclusive partnerships that empower every family to actively participate in their student's educational journey.

Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	5
10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	5
11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	5
12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	5

Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

Sage Oak Charter School continues to strengthen its decision-making process by actively engaging educational partners across various platforms. In 2024–25, the school operated two advisory committees: the Parent Advisory Committee (PAC) and newly launched Student Advisory Committee (STAC). These groups meet consistently to reflect on student needs and school priorities. Additional input is collected through annual and mid-year family surveys, live and recorded trainings, and regular interaction between families and teachers. The school also hosted a virtual parent summit to expand opportunities for family engagement. Events such as field trips, socials, college tours, and graduation ceremonies further promote communication and shared decision-making. This multifaceted approach ensures educational partners are informed, included, and heard throughout the year.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

For 2025–26, the school is focused on increasing family participation in formal decision-making groups by launching a new Parent Engagement Committee. This committee will serve as another forum for families to provide feedback and influence planning of regular parent engagement events. Earlier and more intentional recruitment for PAC will also be emphasized to increase awareness and engagement. The Student Advisory Committee, now in place, provides students a dedicated voice in school improvement efforts. Together, these expanded opportunities aim to improve equity and inclusion in the input-gathering process.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

To improve participation among underrepresented families, Sage Oak will implement targeted strategies aimed at accessibility, inclusion, and outreach. The school will continue its multi-channel communication approach—email, social media, website updates, and teacher-family conversations—to keep families informed about surveys, advisory meetings, and public board sessions. Staff will proactively invite families from diverse backgrounds to participate in the new Parent Engagement Committee, as well as in PAC and parent summits. Presentations at school events and onboarding sessions will also highlight how families can get involved in decision-making. These steps will help foster a culture of belonging and ensure a broader range of voices guide the school's direction.

School Climate (LCFF Priority 6)

Introduction

The initial design of the Local Control Funding Formula recognized the critical role that positive school conditions and climate play in advancing student performance and equity. This recognition is grounded in a research base demonstrating that a positive school climate directly impacts indicators of success such as increased teacher retention, lower dropout rates, decreased incidences of violence, and higher student achievement.

In order to support comprehensive planning, LEAs need access to current data. The measurement of school climate provides LEAs with critical data that can be used to track progress in school climate for purposes of continuous improvement, and the ability to identify needs and implement changes to address local needs.

Introduction

LEAs are required, at a minimum, to annually administer a local climate survey. The survey must:

- Capture a valid measure of student perceptions of school safety and connectedness in at least one grade within each grade span the LEA serves (e.g. TK-5, 6-8, 9-12); and

- At a minimum, report disaggregated data by student groups identified in California Education Code 52052, when such data is available as part of the local school climate survey.

Based on the analysis of local data, including the local climate survey data, LEAs are to respond to the following three prompts. Each prompt response is limited to 3,000 characters. An LEA may provide hyperlink(s) to other documents as necessary within each prompt:

Prompt 1 (DATA): Describe the local climate survey data, including available data disaggregated by student groups. LEAs using surveys that provide an overall score, such as the California Healthy Kids Survey, are encouraged to report the overall score for all students as well as available student group scores. Responses may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

Sage Oak Charter School annually administers a comprehensive local climate survey to parents, students, and staff to assess perceptions of school safety, connection, and engagement. The most recent data reflect strong outcomes across all stakeholder groups, with particular strengths in areas tied to safety, respectful environments, and curriculum quality.

Parent Survey Highlights:

99% of parents believe the curriculum and resources provide a robust, well-rounded educational experience.
 89% feel connected to the school's mission of empowering students to lead purposeful and productive lives.
 88% feel Sage Oak effectively provides opportunities for involvement and input, reflecting healthy engagement levels.
 98% agree the school prioritizes safety, value, and respect.
 93% are informed about student social-emotional and mental health support resources.

Staff Survey Highlights:

94% believe the school's curriculum is rigorous and well-rounded.
 98% of teachers and EAs feel equipped to prepare students for the next grade band.
 93% feel English Learners have adequate access to academic supports.
 95% feel connected to the school's mission.
 97% believe their voices are valued in decision-making.
 99% affirm the school prioritizes safety, value, and respect.
 97% feel professionally equipped through PD offerings.
 94% are informed of student support resources.

Student Survey Highlights:

96% report that curriculum and resources are challenging and well-rounded.
 91% feel connected to the school's mission.
 89% feel they are given opportunities for input and involvement.
 98% agree the school prioritizes a safe, respectful learning environment.
 90% are aware of available mental health and social-emotional supports.

Prompt 2 (MEANING): Describe key learnings, including identified needs and areas of strength determined through the analysis of data described in Prompt 1, including the available data disaggregated by student group.

The analysis of Sage Oak's local climate survey reveals clear strengths in school climate, particularly around stakeholder confidence in academic quality, student safety, staff preparedness, and alignment with the school's mission. Across all groups—parents, staff, and students—responses reflect a deeply supportive, respectful, and engaging educational environment.

Key Areas of Strength:

Academic Quality and Rigor: A significant majority of respondents across all groups indicated satisfaction with the curriculum's quality—99% of parents, 94% of staff, and 96% of students. This reflects a shared confidence that Sage Oak provides a challenging and comprehensive educational experience.

Safety and Respect: High agreement levels—98% (parents), 99% (staff), and 98% (students)—indicate that Sage Oak fosters a safe and respectful learning environment, a key factor in promoting student well-being and engagement.

Mental Health and Support Awareness: Over 90% of all groups reported awareness of social-emotional and mental health supports, affirming that communication about these services is reaching stakeholders effectively.

Staff Preparedness: Staff responses demonstrate strong confidence in their professional readiness, with 97% affirming that PD equipped them to succeed in their roles.

Identified Needs and Growth Opportunities:

Engagement and Input: While still positive overall, scores related to opportunities for input and involvement were slightly lower: 89% of parents and 88% of students agreed their voices were heard, compared to 97% of staff. This gap suggests an opportunity to deepen engagement efforts, especially for families and students who may not yet feel fully empowered to contribute to decision-making.

Student Connection to Mission: While still positive, 89% of parents and 91% of students reported feeling connected to the school's mission—slightly lower than staff (95%). This suggests room to deepen mission-centered experiences, especially for families who may interact less frequently with mission-driven programming.

These insights underscore that while Sage Oak's school climate is overwhelmingly positive, intentional efforts to strengthen two-way communication and input opportunities—especially for families and students—will enhance inclusion and foster deeper connection.

Prompt 3 (USE): Describe any changes to existing plans, policies, or procedures that the LEA determines necessary in order to address areas of need identified through the analysis of local data and the identification of key learnings. Include any revisions, decisions, or actions the LEA has, or will, implement for continuous improvement purposes.

Based on key findings from the local climate survey, Sage Oak Charter School will implement several targeted strategies to address areas of need and build on existing strengths related to school climate and stakeholder engagement.

Enhancing Student and Family Voice in Decision-Making

To address the slight discrepancy in perceived opportunities for involvement—particularly among parents (88%) and students (89%)—the school will expand structured input opportunities in 2025–26. This includes forming a new Parent Engagement Committee designed to complement existing advisory bodies (PAC and STAC), ensuring broader representation and more regular input from families who may not be engaged in current forums. These committees will continue to help elevate voices that were previously underrepresented in decision-making processes.

Deepening Student Mission Connection

While 91% of students and 89% of parents report feeling connected to the school's mission, Sage Oak will take steps to reinforce this connection through intentional student experiences. Advisors and counselors will embed mission-aligned reflections in academic planning meetings, and student-centered activities—such as leadership opportunities, service projects, and career exploration—will be expanded to help students see how their learning aligns with the broader purpose of “leading purposeful and productive lives.”

Strengthening Communication Around Input Channels

Survey data suggest that while Sage Oak offers many pathways for engagement, not all stakeholders are fully aware of them. To address this, the school will implement a more visible communication campaign—through newsletters, social media, onboarding, and an additional virtual parent summit—outlining specific ways families and students can participate in shaping school decisions. Staff will also be encouraged to personally invite families to participate in upcoming meetings and surveys, especially those from underrepresented groups.

Sustaining and Building on Areas of Strength

Given exceptional scores in school safety and respect (98–99%), the school will maintain current safety policies, staff PD frameworks, and mental health outreach efforts. The team will also ensure continued availability and promotion of social-emotional supports, particularly during high-stress periods such as testing and transitions.

These actions, rooted in the climate survey results, reflect Sage Oak's ongoing commitment to inclusivity, connection, and continuous improvement across all dimensions of school climate.

Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

Sage Oak Charter School uses personalized educational planning as a key tool to ensure all students—across grade spans, student groups, and those with exceptional needs—have access to and are enrolled in a broad course of study. Each student's plan is collaboratively developed by the supervising teacher or educational advisor (EA), parent/guardian, and student. As needed, the Counselor, English Learner (EL) Coordinator, Homeless and Foster Youth Liaison, 504/SST Coordinator, and Special Education Case Managers contribute to the planning process to ensure equitable access and alignment with each student's unique needs.

The personalized plan includes a course of study selected from a school-approved list of curriculum options that are standards-aligned and meet graduation requirements. Plans are regularly reviewed and updated to reflect students' evolving interests, goals, and academic progress. This process allows the school to monitor course access and participation for unduplicated student groups and individuals with exceptional needs, ensuring that all students are supported in pursuing a full, diverse academic experience.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

Sage Oak Charter School ensures all students have access to, and are enrolled in, a broad course of study through personalized academic planning, continuous monitoring, and support from a multidisciplinary team. Teachers and educational advisors (EAs) regularly review course enrollment and academic progress, using both performance data and anecdotal evidence to assess alignment with students' interests, abilities, and needs. Plans are adjusted as needed in collaboration with the Counselor, EL Coordinator, Homeless and Foster Youth Liaison, 504/SST Coordinator, and Special Education Case Managers to ensure equitable access for unduplicated student groups and students with exceptional needs.

All students select their curriculum from a school-approved, standards-aligned list that spans core subjects and electives across grade levels. Because Sage Oak operates as one independent study based school without multiple physical sites, there are no differences in course access across locations. Over time, the school has expanded its course offerings—including increased synchronous classes and electives—to further support diverse learning styles and academic interests. This ongoing, student-centered process allows for broad, individualized access to educational opportunities for all learners.

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

A primary barrier to providing full access to a broad course of study—particularly in Career Technical Education (CTE)—has been the absence of a physical school site, which limits hands-on instructional opportunities. To address this, Sage Oak has partnered with local community colleges to promote dual enrollment, enabling students to access in-person CTE resources and specialized training not available in a virtual setting.

Additionally, the school has expanded its catalog of CTE pathways that are compatible with online learning. These include courses in animation, visual arts, child development, business, sports medicine and information technology, which provide students with meaningful, career-aligned experiences within a virtual framework. To further reduce barriers, Sage Oak is investing in professional development to equip teachers with the tools and knowledge to effectively promote CTE options to students during academic planning. This ensures more students—especially those in unduplicated student groups—are aware of, and encouraged to pursue, available CTE pathways, despite the challenges posed by the independent study model.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

By the end of the 2026-27 academic year, we plan to offer 200 Career Technical Education (CTE) aligned courses across K-12, supporting career readiness with practical skills and industry knowledge. To enhance college and career indicators, we aim to increase the CCI by 2% annually, focusing on metrics that reflect successful preparation for post-secondary pathways. Further, we are encouraging an increase in student enrollment in A-G courses, aiming to ensure that more students are eligible for UC and CSU admissions. Alongside this, we are dedicated to maintaining a high standard of excellence in advanced coursework, with a target of keeping our AP exam pass rate at 72% or higher. These initiatives are designed to ensure comprehensive access to a diverse and challenging curriculum that prepares students for a variety of future academic and career paths.

Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

Assess the degree of implementation of coordinated service program components for foster youth in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Services	1	2	3	4	5
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					

Coordinating Services	1	2	3	4	5
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					

Coversheet

(Hearing) 2025-2026 Proposed July Budget - Sage Oak Charter Schools

Section: XVI. Public Hearing
Item: B. (Hearing) 2025-2026 Proposed July Budget - Sage Oak Charter Schools

Purpose: Discuss

Submitted by:

Related Material:

2025-2026 Proposed July Budget Presentation_6.12.2025.pdf

2025-2026 Proposed July Budget - Sage Oak Charter Schools_6.12.2025.pdf

Education Protection Account (EPA) - Sage Oak Charter School #1885_6.12.2025.pdf

Education Protection Account (EPA) - Sage Oak Charter School - Keppel #1886_6.12.2025.pdf

Education Protection Account (EPA) - Sage Oak Charter School - South #2051_6.12.2025.pdf



2025-26 July Budget

June 12, 2025, Presentation to the Governing Board

Budget Overview



1 Enrollment Growth

2 Financial Picture

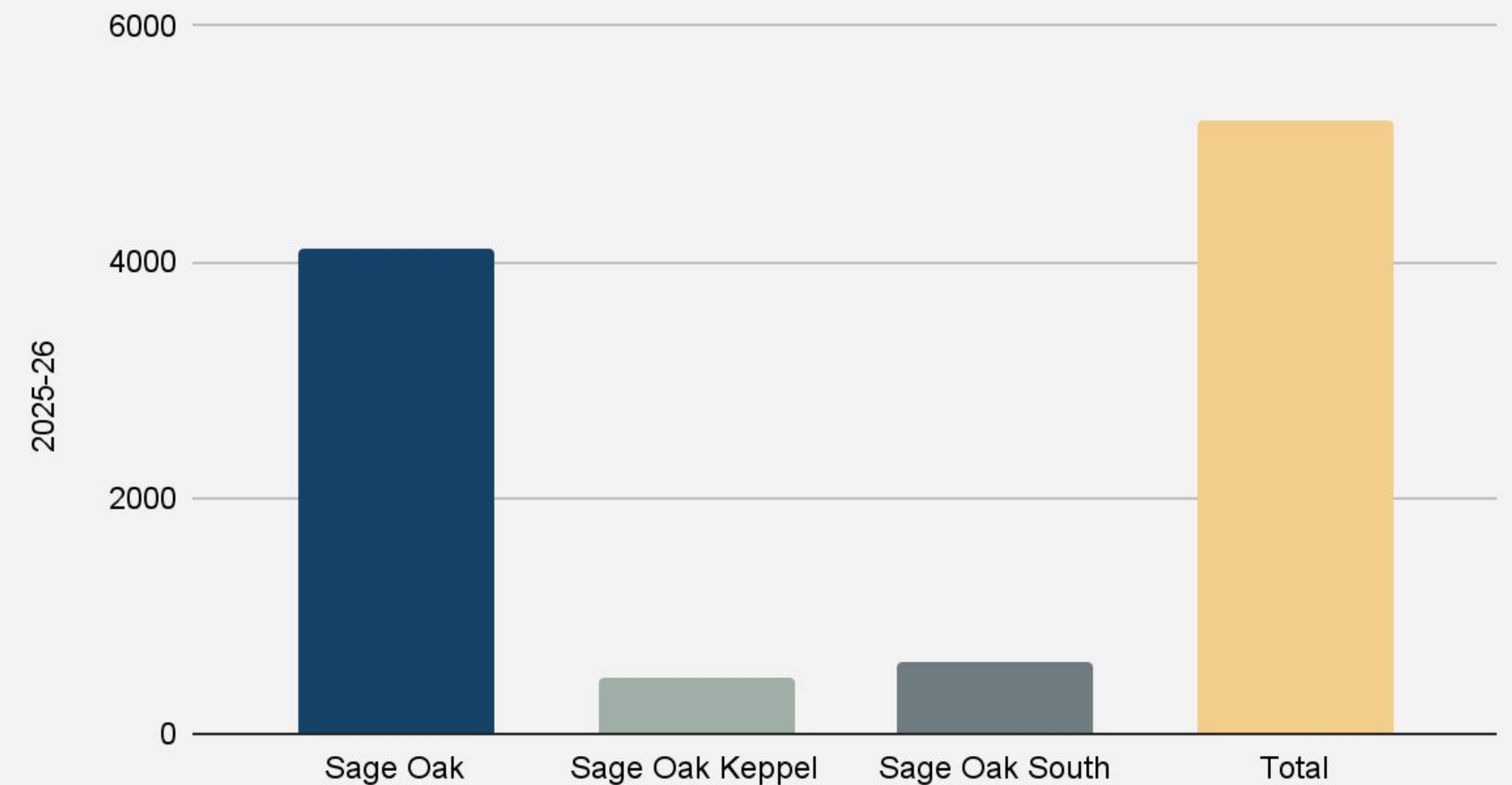
3 The Road Ahead

Enrollment

Sage Oak has experienced strong demand for its programs going into the 2025-26 school year. Management anticipates total growth of approximately 300 students, or 6%.

Sage Oak received 2,745 new student applications as of the week ending 5/16/25. The school is intentional about keeping the quality of its programs at the highest levels and prioritize this and student outcomes as success factors over big numbers.

2025-26 Enrollment



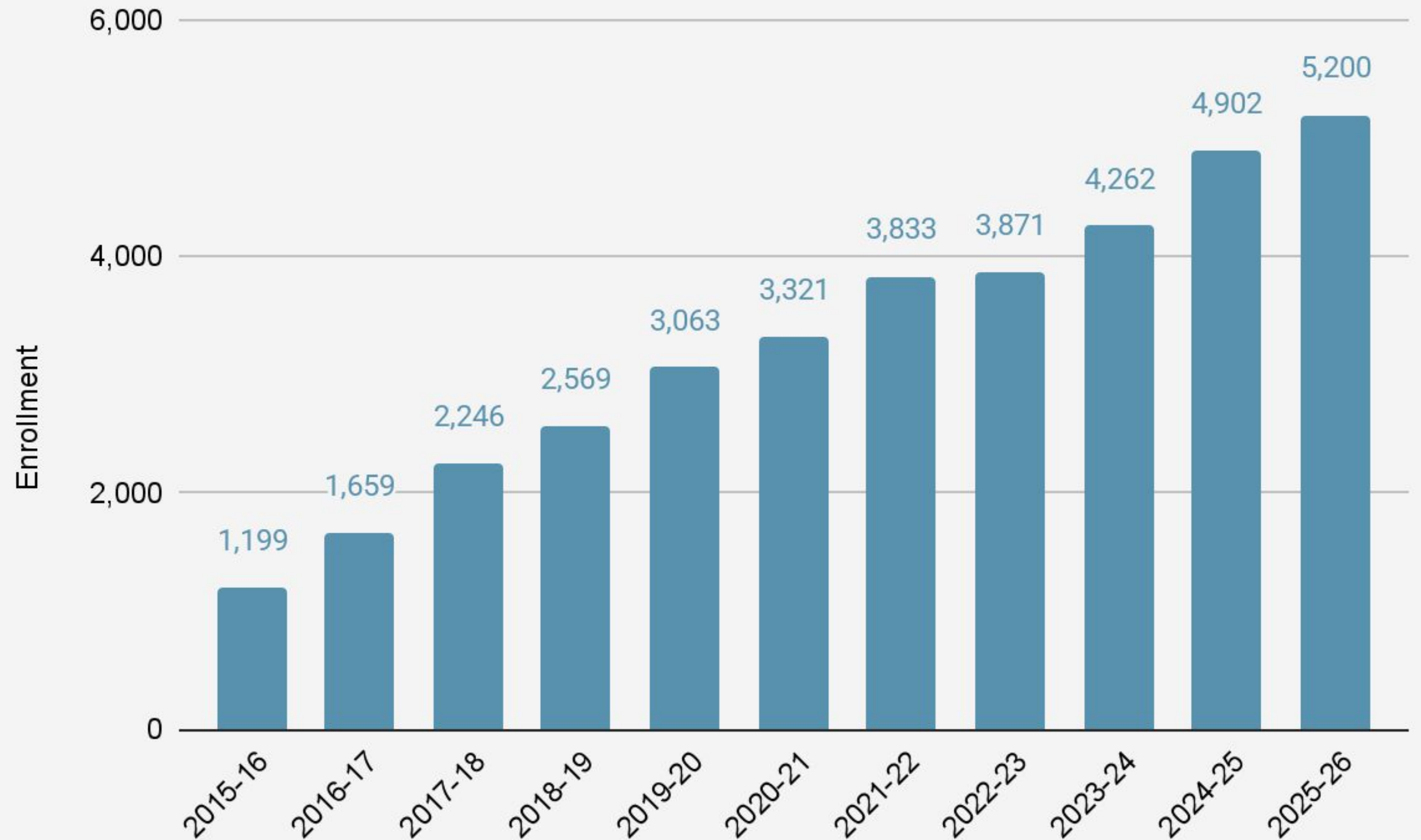
2025-26 Enrollment

Enrollment

Sage Oak has experienced strong demand for its programs going into the 2025-26 school year. Management anticipates total growth of approximately 300 students, or 6%.

Sage Oak received 2,745 new student applications as of the week ending 5/16/25. The school is intentional about keeping the quality of its programs at the highest levels and prioritize this and student outcomes as success factors over big numbers.

Enrollment Growth

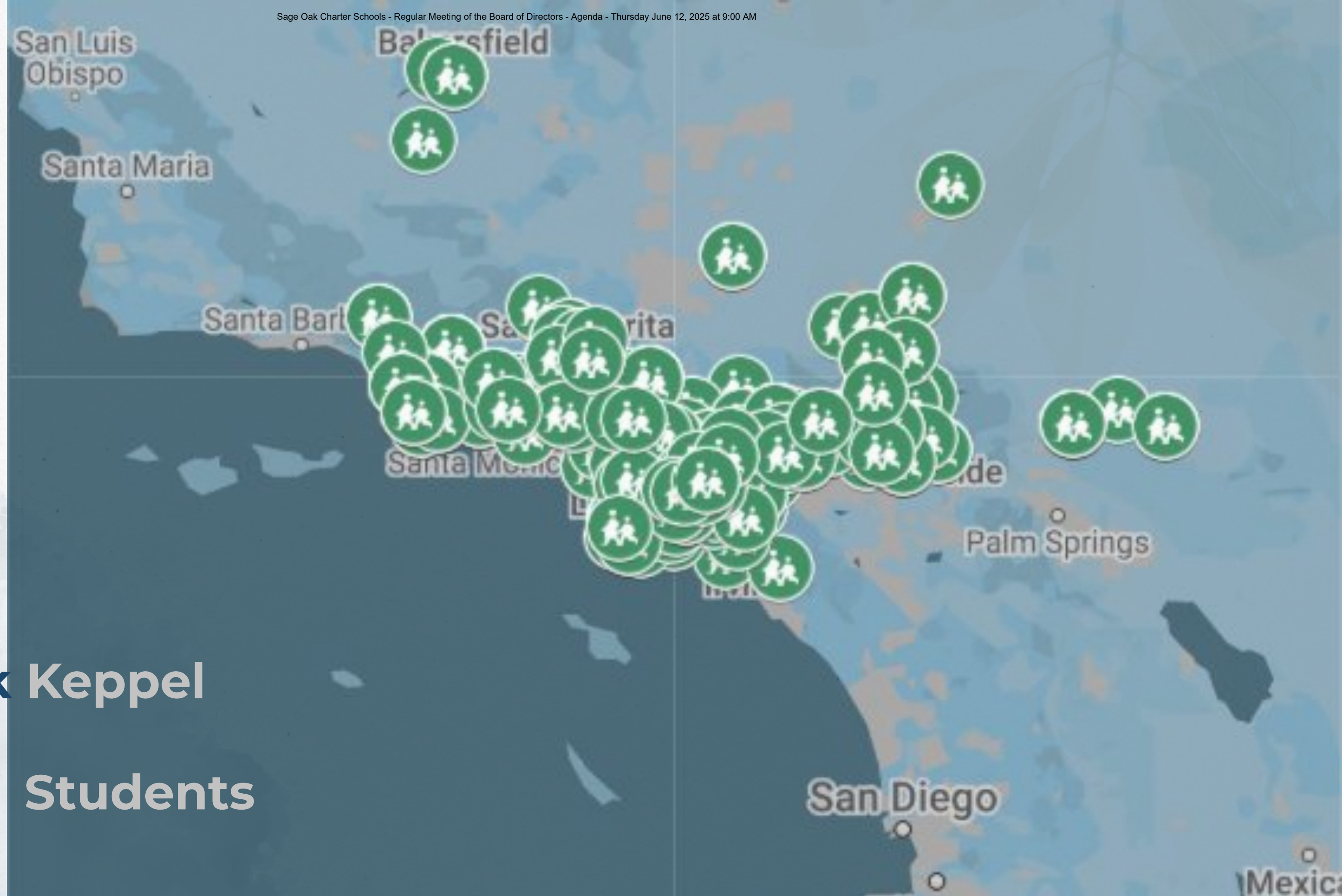


Enrollment Growth

Enrollment

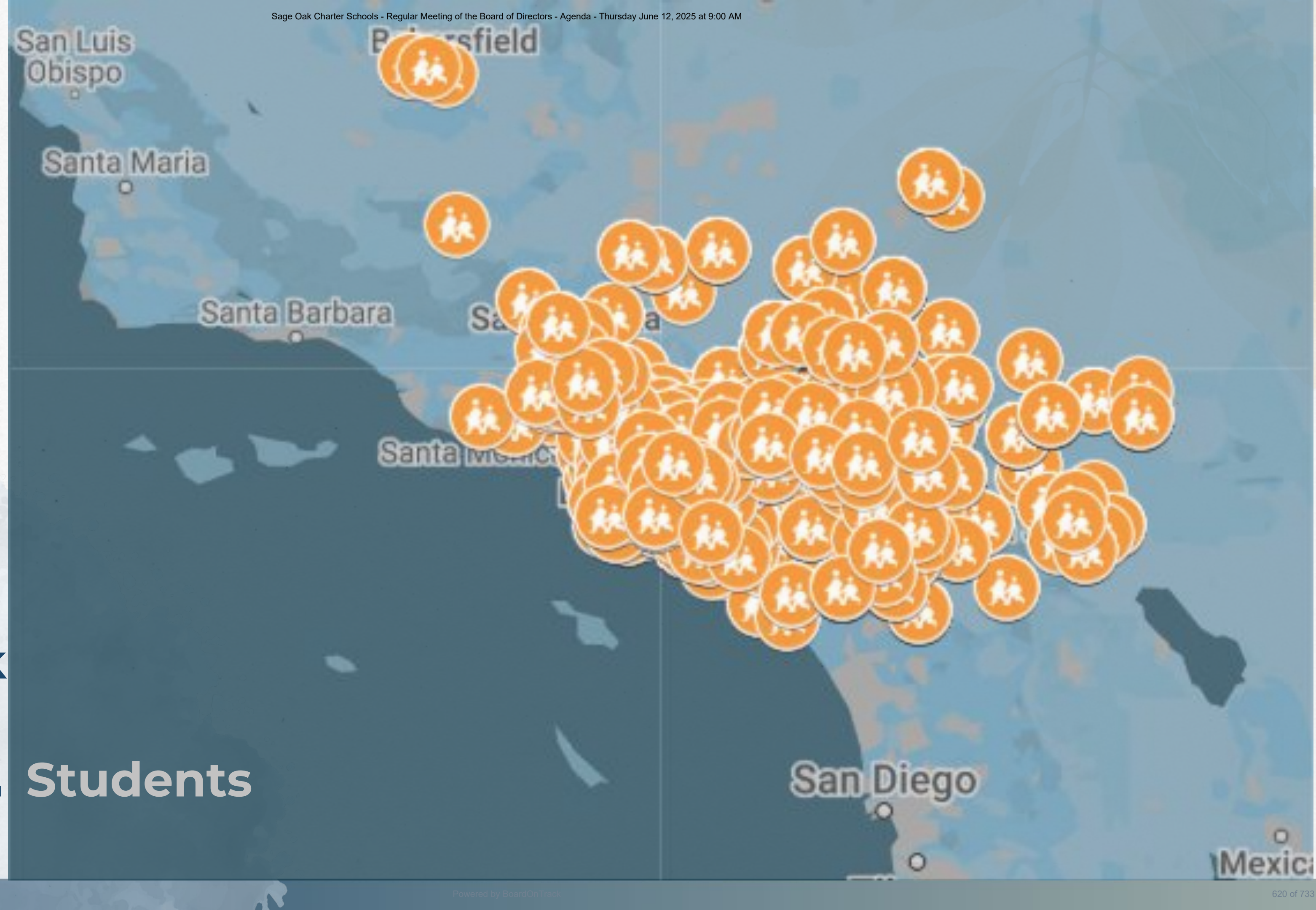
Sage Oak South
613 Students





Sage Oak Keppel
465 Students

Sage Oak
4,122 Students





Sage Oak All Schools

5,200 Students

Sage Oak Charter Schools

Assumptions



1. Enrollment to Average Daily Attendance (ADA), 99.4%

2. Unduplicated Pupil Percentage (UPP), 42%

3. Multi-Year Projection (MYP) COLA rates, 3.52% and 3.63% for 2026-2028

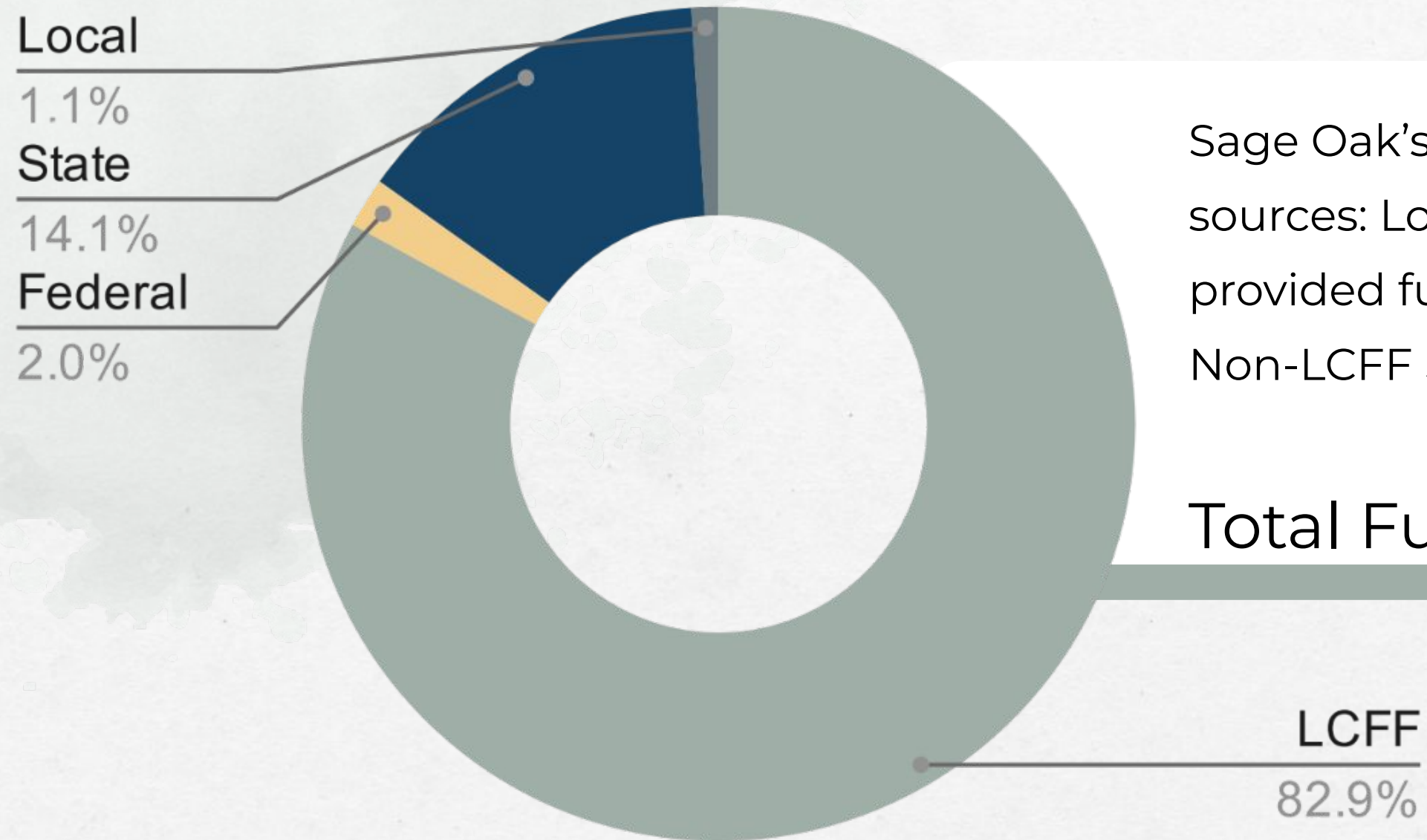
4. Participation in Federal Every Student Succeeds Act (ESSA) Programs, Title I, III, and IV

5. 2025-26 Revenue COLA funded at 2.3%

6. Internal Rate of Return for Local Revenue Interest, 3.3% and 3.9% for the County Treasury and Commercial Money Market sweep accounts

Sage Oak Charter Schools

Revenue



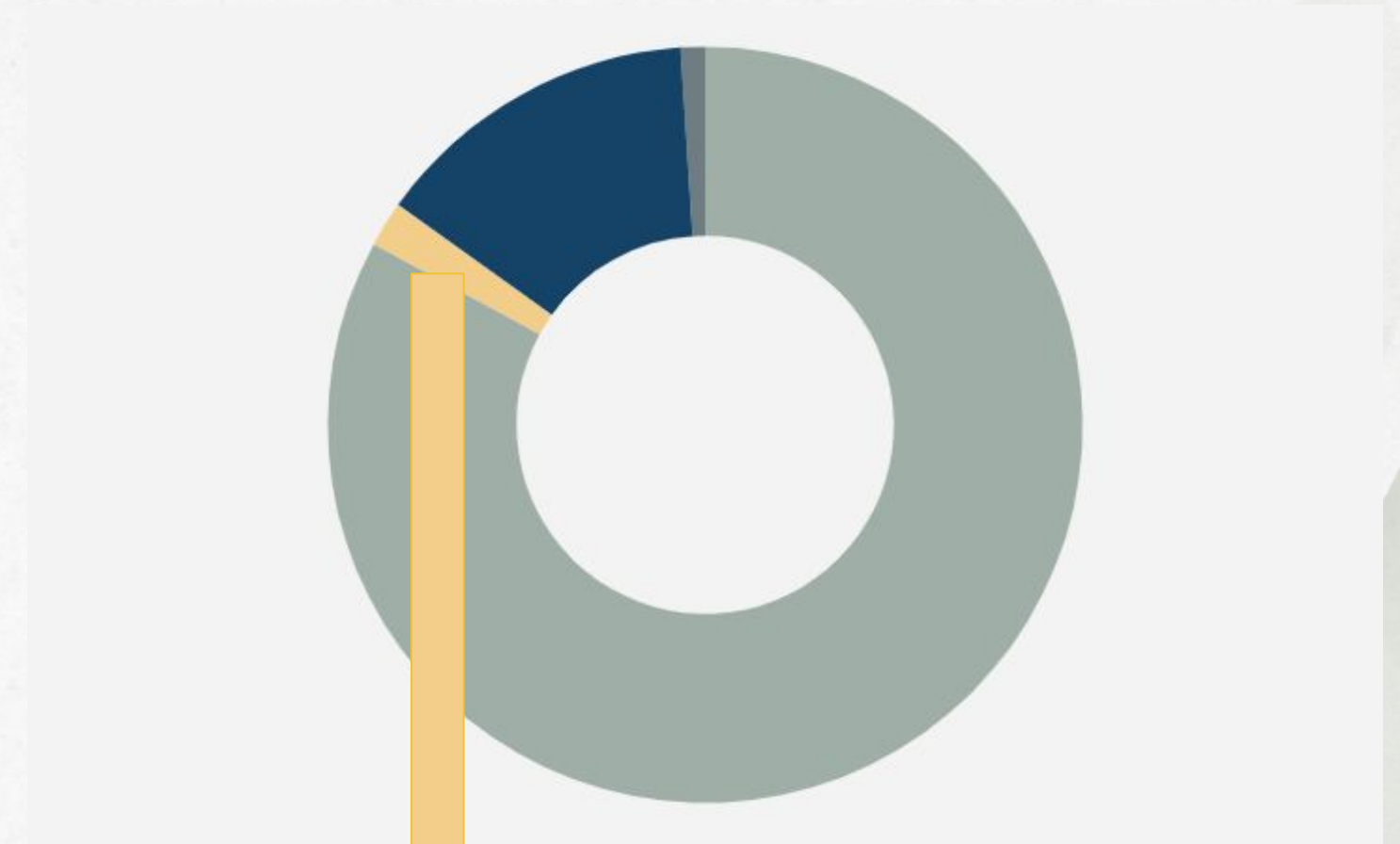
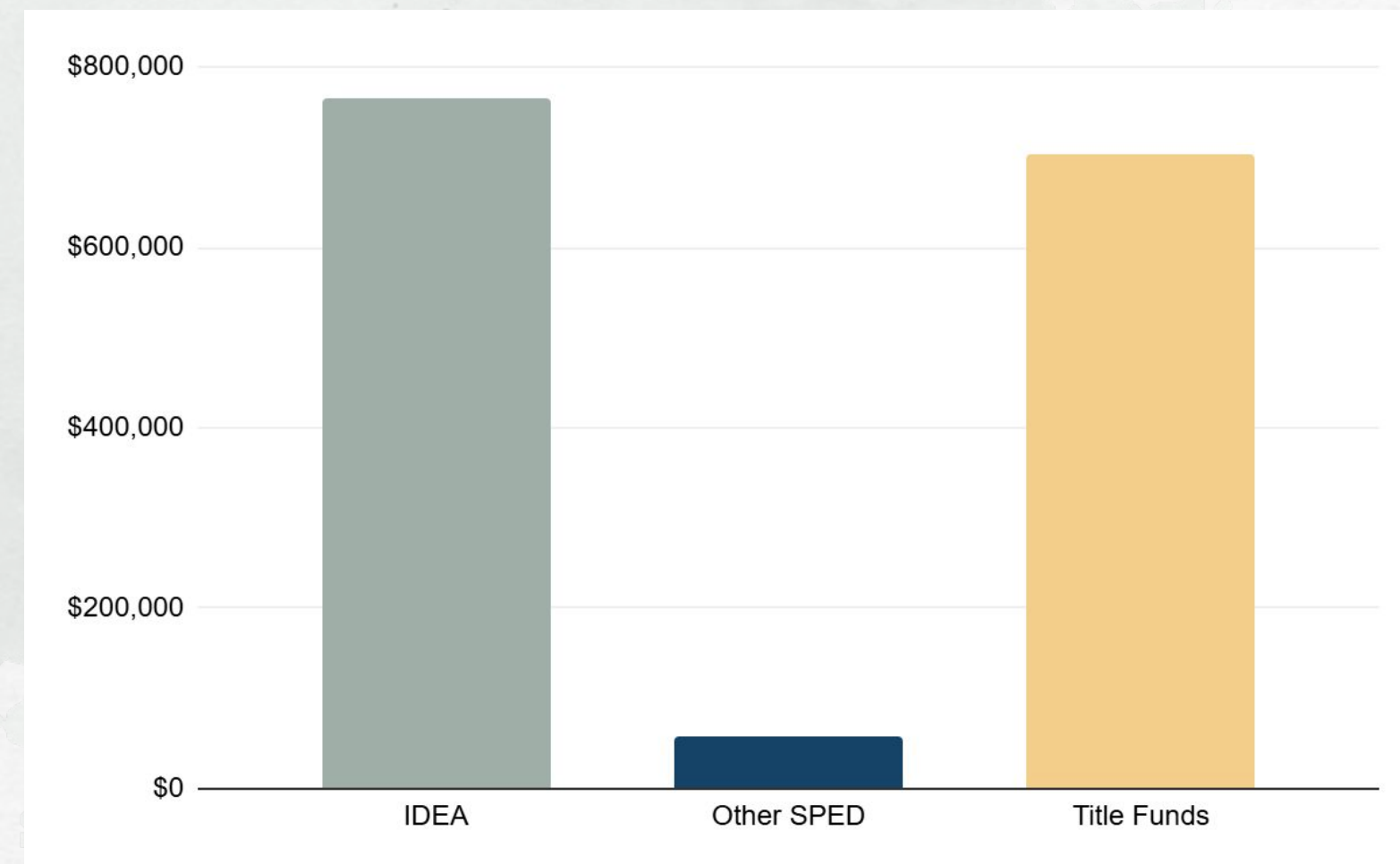
Sage Oak's Revenue is made up of four primary sources: Local Control Funding Formula (LCFF), a State provided fund, Federal funds, Local funds, and other Non-LCFF State funds.

Total Funding for 2025-26, **\$78,229,111**

Sage Oak Charter Schools

Federal Funding

Federal funds make up 2% of Sage Oak's total 2025-26 revenue.



Sage Oak Charter Schools

One Time Funding

Grants

- Learning Recovery Emergency Block Grant
- Educator Effectiveness
- A-G Completion
- Arts, Music, and Instructional Materials
Discretionary Block Grant
- Literacy Screenings Professional Development

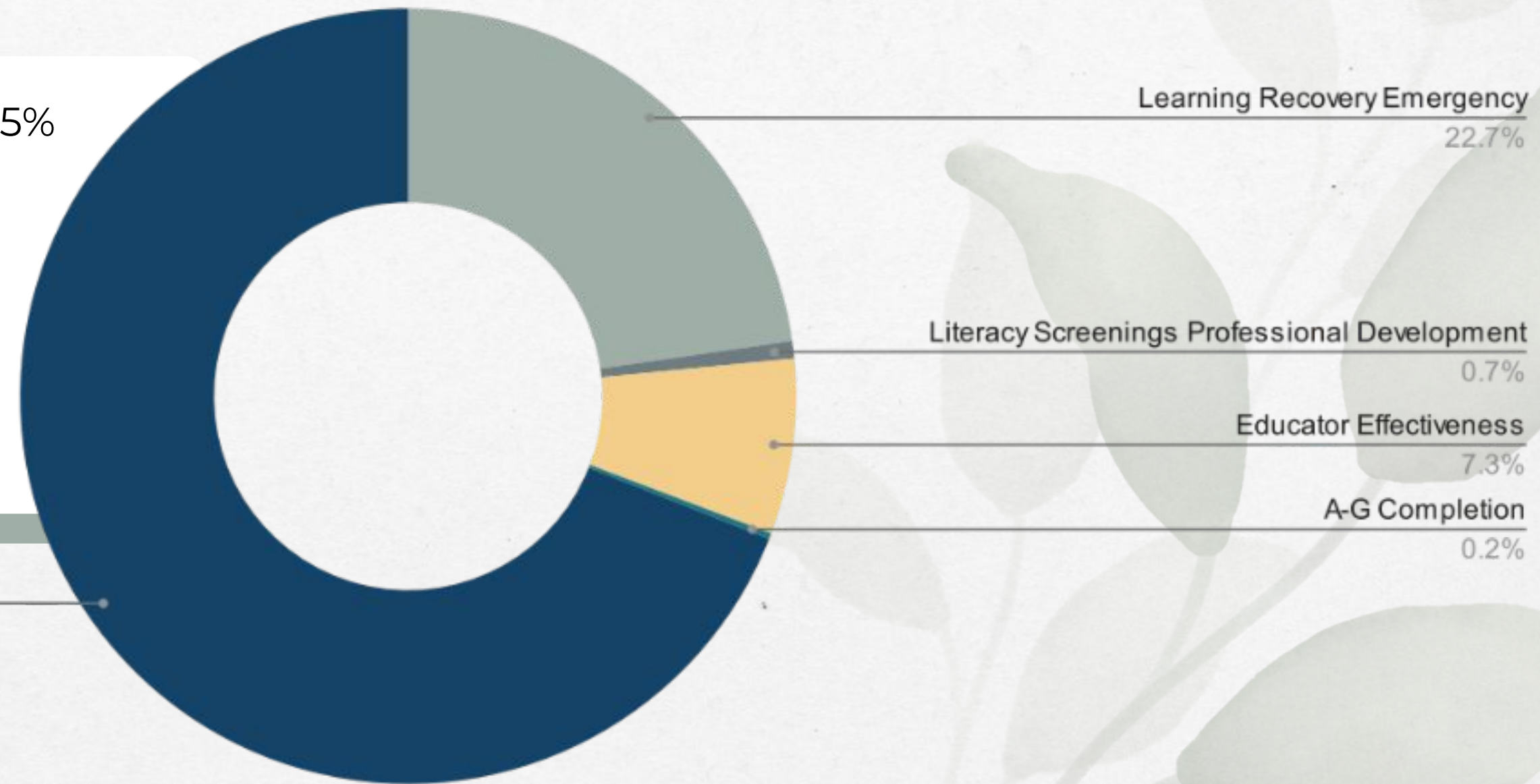
Sage Oak Charter Schools

One-Time Funding

One-time revenue at Sage Oak comprises 4.5% of total revenue, up from 2.11% in 2024-25.

Total One-Time Funding for 2025-26, **\$3,521,264**

Arts, Music, and Instructional Material
69.0%



Sage Oak Charter Schools

Net Revenue & Reserves

Net revenue provides a measure of financial performance in the current year. Each of Sage Oak’s three charters is projected to have a positive net revenue. Reserves, the sum total of all prior years’ net revenue, illustrate the relative strength over time, and the resources ready to deploy in an unexpected economic event. Reserve levels also fuel future year growth in terms of available cash.



Sage Oak

Net Revenue	\$382,262
Ending Fund Balance	\$18,356,600



Sage Oak Keppel

Net Revenue	\$33,833
Ending Fund Balance	\$2,796,231



Sage Oak South

Net Revenue	\$58,714
Ending Fund Balance	\$3,991,313

Sage Oak Charter Schools

Net Revenue & Reserves

Net revenue provides a measure of financial performance in the current year. Each of Sage Oak's three charters is projected to have a positive net revenue. Reserves, the sum total of all prior years' net revenue, illustrate the relative strength over time, and the resources ready to deploy in an unexpected economic event. Reserve levels also fuel future year growth in terms of available cash.



Sage Oak

Net Revenue	\$382,262
Ending Fund Balance	\$18,356,600



Sage Oak Keppel

Net Revenue	\$33,833
Ending Fund Balance	\$2,796,231



Sage Oak South

Net Revenue	\$58,714
Ending Fund Balance	\$3,991,313

Sage Oak Charter Schools

Net Revenue & Reserves

Net revenue provides a measure of financial performance in the current year. Each of Sage Oak's three charters is projected to have a positive net revenue. Reserves, the sum total of all prior years' net revenue, illustrate the relative strength over time, and the resources ready to deploy in an unexpected economic event. Reserve levels also fuel future year growth in terms of available cash.



Sage Oak

Net Revenue	\$382,262
Ending Fund Balance	\$18,356,600



Sage Oak Keppel

Net Revenue	\$33,833
Ending Fund Balance	\$2,796,231



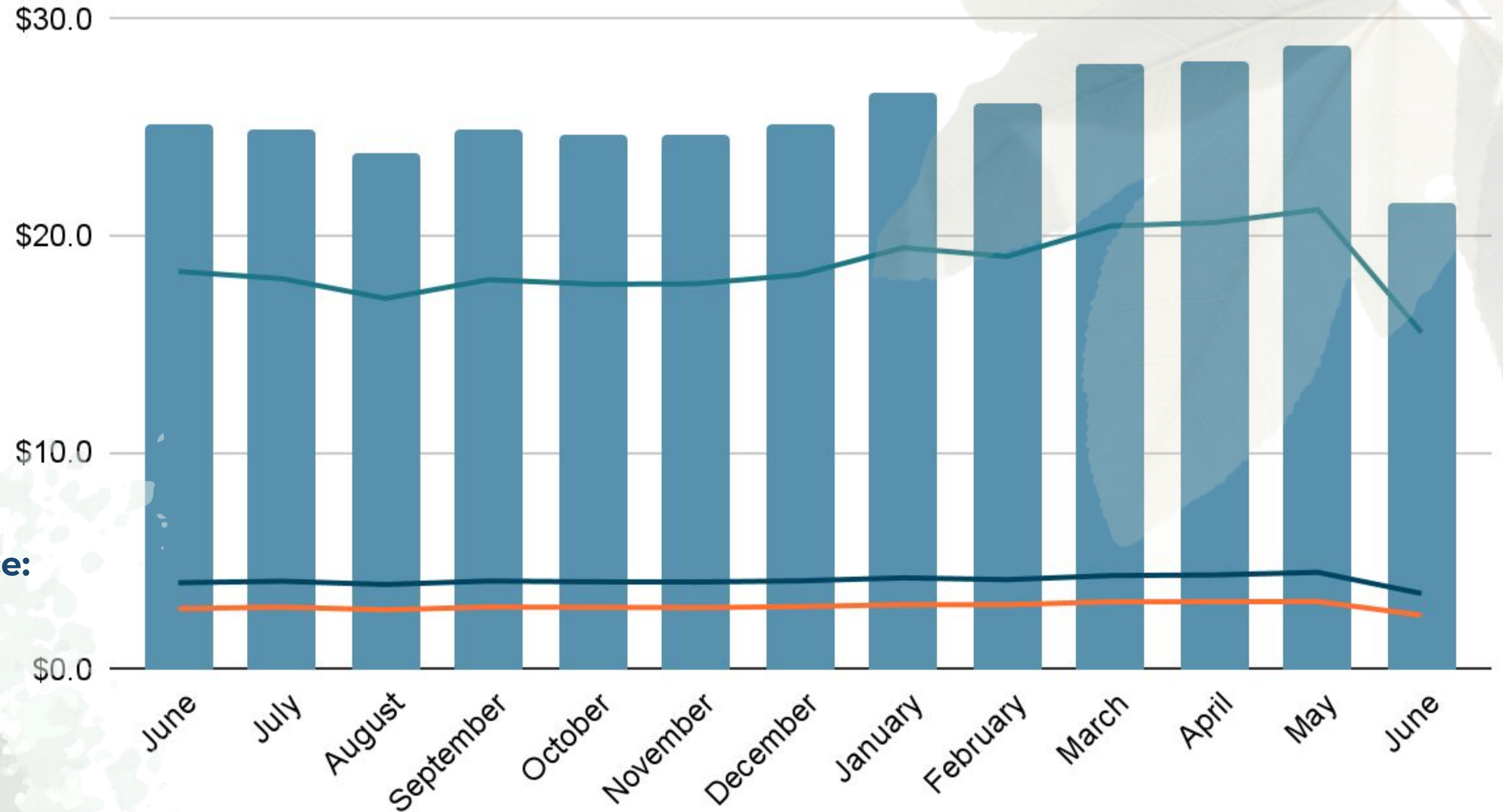
Sage Oak South

Net Revenue	\$58,714
Ending Fund Balance	\$3,991,313

Sage Oak Charter Schools Cash Flow

Values in
millions

■ Total ■ South ■ Keppel ■ SOCS



Lowest Cash Balance:

June 2026

\$21,529,948

Sage Oak Charter Schools

Cash Flow

Values in
millions

Lowest Cash Balance:
June 2026
\$21,529,948

Sage Oak Charter Schools

The Road Ahead

- 1. Legislative Concerns**
2. California Economy
3. Federal Support for Education

Sage Oak Charter Schools

The Road Ahead

1. Legislative Concerns
- 2. California Economy**
3. Federal Support for Education

Sage Oak Charter Schools

The Road Ahead

1. Legislative Concerns
2. California Economy
- 3. Federal Support for Education**



Thank You!





Sage Oak Charter Schools 2025-26 July Budget



Table of Contents

Sage Oak Charter Schools - Consolidated

Introduction & General Comments	1
Funding Assumptions	2
One-Time Funds	3
Federal Funds	5
2025-26 July vs Estimated Actuals (EA) - Detail	7
Cash Flow Statement 2025-26	11
Comprehensive Department Budget	12

Sage Oak Charter School

Summary Analysis	22
Enrollment and Average Daily Attendance (ADA) Assumptions	23
2025-26 July vs EA Summary	24
2025-26 July vs EA Detail	25
2025-26 July vs EA Multi-Year Projection (MYP) Summary	29
2025-26 July vs EA MYP Detail	30
Cash Flow Statement 2025-26	35
Cash Flow Statement 2026-27	36
Financial Report - Alternative Form	37



Table of Contents

Sage Oak Charter School - Keppel

Summary Analysis	44
Enrollment and ADA Assumptions	45
2025-26 July vs EA Summary	46
2025-26 July vs EA Detail	47
2025-26 July vs EA Multi-Year Projection (MYP) Summary	51
2025-26 July vs EA MYP Detail	52
Cash Flow Statement 2025-26	57
Cash Flow Statement 2026-27	58
Financial Report - Alternative Form	59

Sage Oak Charter School - South

Summary Analysis	66
Enrollment and ADA Assumptions	67
2025-26 July vs EA Summary	68
2025-26 July vs EA Detail	69
2025-26 July vs EA Multi-Year Projection (MYP) Summary	73
2025-26 July vs EA MYP Detail	74
Cash Flow Statement 2025-26	79
Cash Flow Statement 2026-27	80
Financial Report - Alternative Form	81



Introduction & General Comments

California State Law mandates that all charter schools must adopt a July Budget annually by July 1. This report compares the 2024-25 Estimated Actuals (EA) with the 2025-26 July Budget. The July Budget for 2025-26 presents Sage Oak's revenue and expenditure forecasts for the current fiscal year and the two subsequent fiscal years.

Included in this report for each of the three Sage Oak Charter Schools are:

- A summary analysis of operations, cash, and changes to revenues and expenditures.
- A detailed statement of activities, also known as the Profit and Loss (P&L), offers account-level details for the current year Estimated Actuals through June 30, 2025, along with the 2025-26 July Budget.
- A Multi-Year Projection (MYP) that offers a view of Sage Oak's anticipated growth trajectory.
- The projected cash flow reports for the current year and the following fiscal year provide a detailed overview of Sage Oak Charter Schools' expected cash position and monthly capacity to implement budgeted programs and meet associated cash requirements.

Sage Oak Charter Schools is projected to generate an operating surplus for the 2025-26 fiscal year, with a combined annual net revenue of \$0.42M (0.5% of expenditures). Sage Oak Charter Schools' exceptional financial strength enables the schools to invest heavily in the students. The projected ending fund balance of \$25.14M represents 32.3% of annual expenditures, equivalent to 118 operating days of potential cash. Each school is well-prepared to navigate unforeseen economic circumstances and accommodate the growth of additional students.

In the 2025-26 fiscal year cash flow analysis, it was observed that the consolidated cash is projected to reach its lowest point at the end of June 2026, with \$21.95M cash on hand. This cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Assumptions related to the production of Sage Oak's Multi-Year Projection (MYP) are listed on the Funding Assumptions page.

The presented information will be compiled into the required report format for each authorizing district, along with any other necessary supplemental financial data required by each authorizer. These reports will be certified by the CFO and promptly delivered to each authorizer following Board approval. Ed Code 42130(a)(1) defines the certifications as:

- Positive: Will meet financial obligations for the current and two subsequent fiscal years.
- Qualified: May not meet financial obligations for the current and two subsequent fiscal years.
- Negative: Will not meet financial obligations for the current or the subsequent fiscal year.

Sage Oak Charter Schools will submit a Positive Certification for the 2025-26 July Budget.



Funding Assumptions

Enrollment & Average Daily Attendance (ADA)

- Grade band information is provided on the Enrollment & ADA Assumptions page.
- The 2025-26 July Budget utilized a 99.4% ADA-to-enrollment ratio, while the Multi-Year Projections (MYP) for 2026-27 and 2027-28 utilized a 99.2% ADA-to-enrollment ratio across all grade bands.
- The 2025-26 July Budget anticipates an enrollment of 5,200, with an ADA of 5,169. The projected growth rates are 9.6% for 2026-27 and 8.8% for 2027-28.
- The three-year rolling average for the Unduplicated Pupil Percentage (UPP) averages 42.0% across all Sage Oak Charter Schools.

LCFF 2025-26 Adjusted Base Grants per ADA

TK-3	4-6	7-8	9-12
\$12,290	\$11,300	\$11,634	\$13,834

- The TK add-on is \$6,404.
- These assumptions serve as data inputs for calculating revenue in the Local Control Funding Formula (LCFF) calculator.

Multi-year Funding

- The projected budgets for the 2025-26 fiscal year use the cost-of-living adjustment (COLA) estimates aligned with the SSC Fiscal Report published on April 30, 2025. For the following two fiscal years, the COLA estimates align with the SSC Dartboard published on January 21, 2025.

	2025-26	2026-27	2027-28
COLA	2.30 %	3.52 %	3.63 %

Federal Funding

- Continued participation in Title I Part A, Title II Part A, and Title IV Part A programs under the Every Student Succeeds Act (ESSA).
- The Federal Individuals with Disabilities Education Act (IDEA) funding is projected to be \$157 per Average Daily Attendance (ADA). For the MYP for 2026-27 and 2027-28, IDEA funding is aligned with the multi-year funding COLA shown in the table above.

State Funding

- LCFF revenue is calculated using the latest version of the Fiscal Crisis & Management Assistance Team (FCMAT) LCFF calculator, with COLA estimates aligned with the multi-year funding table shown above.
- The preliminary funding for Proposition 28 in 2025-26 includes an entitlement of \$0.7M, with \$0.6M allocated in the 2025-26 July Budget. For the MYP for 2026-27 and 2027-28, funding was augmented based on the COLA for each year. LEAs must allocate a minimum of 80.0% of these funds towards staffing for arts education instruction, while the remaining portion is designated for training supplies, curriculum, professional learning, materials, and arts educational partnership programs.
- The allocated funding of \$2.4M from the Arts, Music, and Instructional Materials Block Grant has been included in the 2025-26 July Budget. Management plans to utilize these funds during the 2025-26 fiscal year to support student field trips, student technology, data analytics software, and professional development.
- The \$2.5M Learning Recovery Emergency Block Grant will continue to be utilized in the 2025-26 fiscal year, with \$0.8M allocated and the remaining amount to be utilized before the grant's expiration date of June 30, 2028.
- Lottery funding, unrestricted and restricted, is budgeted based on \$191 and \$82 per ADA, respectively.
- Special Education AB602 revenue is budgeted to \$917 per current year ADA. For the MYP, the amount was augmented based on the COLA for each year.
- Mandated Block Grant is funded at \$20 and \$57 per ADA for K-8 and 9-12, respectively. For the MYP, the amount was augmented based on the COLA for each year.

Local Funding

- Approximately \$0.8M in interest revenue is projected from funds held at the San Diego County Office of Education Treasury and Chase Bank.



One-Time Funds

Usage of One-Time Grants:

Sage Oak strategically utilizes one-time grants to maximize student benefits while ensuring long-term fiscal responsibility. This involves balancing the timing and restrictions associated with each grant.

Financial Impact of Grants:

One-time grants represent an average of 2.0% of revenue for the current and the following two fiscal years. Despite being substantial in absolute terms, they are relatively small compared to the overall budget, illustrating their limited impact on the Schools' budget.

Long-Term Planning:

Sage Oak conducts financial modeling to ensure effective operations after the one-time grants are spent. The sustainability of expenditures tied to the one-time grants is assessed based on the Schools' growth. As the School grows, the reliance on one-time grants decreases, and expenditures related to these grants can be maintained through the Schools' increasing revenue.

Overall Strategy:

Management decides how ongoing expenses can be covered by the Schools' growth without future dependence on one-time grants. The figures below, titled "Grant Percentage of Total Revenues," show that as the School expands, the proportion of revenue from one-time grants decreases relative to total revenue, and the expenditures initially supported by these grants can continue seamlessly, if opted, with the Schools' projected growth in revenue.

Explanations of One-Time Funds:

Grant	Expenditure Details:
Learning Recovery Emergency Block Grant	The Learning Recovery Block Grant will be utilized for salaries, benefits, and programs that are Multi-Tiered System of Support (MTSS).
Educator Effectiveness	The Educator Effectiveness Grant currently covers expenses for teacher induction programs, coaching, local teacher training, conferences pertaining to teacher and independent study modules, and diverse training for staff.
A-G Completion	The A-G Completion Grant covers expenses for the Advancement Via Individual Determination (AVID) programs offered by Sage Oak.
Arts, Music, and Instructional Materials Discretionary Block Grant	The Arts, Music, and Instructional Materials Discretionary Block Grant (AMIM) will support student field trips, student technology, data analytics software, A.I. integration, and staff professional development.
Literacy Screenings Professional Development	The Literacy Screening and Training Grant will be used to assess kindergarten through second-grade students for potential reading difficulties.



(Continued on next page)

One-Time Funds

Revenues:

	2024-25	2025-26	2026-27	2027-28
Total LCFF Revenues	58,599,773	64,871,261	73,456,008	82,787,371
Total Federal Revenues	1,321,963	1,525,525	1,570,510	1,649,650
Total Other State Revenues	8,228,583	11,009,308	8,350,859	9,290,383
Total Local Revenues	823,017	823,017	823,017	823,017
Total Revenues	68,973,336	78,229,111	84,200,394	94,550,421

One-time Grants Supplemental Details:

Grant	Expiration	Revenue Type	Available	2025-26	2026-27	2027-28	Remaining
Learning Recovery Emergency	06/30/2028	Other State	1,534,258	800,000	734,258	0	0
Literacy Screenings	06/30/2026	Other State	25,635	25,635	0	0	0
Professional Development							
Educator Effectiveness	06/30/2026	Other State	257,399	257,399	0	0	0
A-G Completion	06/30/2026	Other State	8,393	8,393	0	0	0
Arts, Music, and Instructional Materials Discretionary	09/30/2026	Other State	2,429,837	2,429,837	0	0	0
Total			4,255,522	3,521,264	734,258	0	0

Grant Percentage of Total Revenues:

	2024-25	2025-26	2026-27	2027-28
Total Revenue	68,973,336	78,229,111	84,200,394	94,550,421
One-Time Funds	1,452,740	3,521,264	734,258	
One-Time Expenses	5,467,759	1,991,600		
Net Revenue	142,250	420,808	1,760,800	4,253,413
Net Revenue Without One-Time Funds	4,157,269	-1,108,856	1,026,542	4,253,413
One-Time Revenue as a % of Total Revenue	2.11%	4.50%	0.87%	0.00%
Projected Total Revenue Growth		9,255,775	5,971,283	10,350,027
Projected Total Revenue Growth Percentages (see notes for details)		13.42%	7.63%	12.29%

Notes:

The projected budgets for the 2025-26 fiscal year use the COLA estimates aligned with the SSC Fiscal Report published on April 30, 2025. For the following two fiscal years, the COLA estimates align with the SSC Dartboard published on January 21, 2025.

	2024-25	2025-26	2026-27	2027-28
COLA	1.07 %	2.30 %	3.52 %	3.63 %
Enrollment	4,890	5,200	5,700	6,200
Enrollment Growth	16.1 %	6.3 %	9.6 %	8.8 %



Federal Funds

Usage of Federal Grants:

Sage Oak strategically utilizes federal grants to maximize student benefits while ensuring long-term fiscal responsibility. This involves balancing the timing and restrictions associated with each grant.

Financial Impact of Grants:

Federal grants represent an average of 1.9% of revenue for the current and the following two fiscal years. Despite being substantial in absolute terms, they are relatively small compared to the overall budget, illustrating their limited impact on the Schools' budget.

Long-Term Planning:

Sage Oak conducts financial modeling to ensure effective operations after the federal grants are spent. The sustainability of expenditures tied to the federal grants is assessed based on the Schools' growth.

Overall Strategy:

Management decides how federal expenses can be covered by the Schools' growth without future dependence on federal grants. The figures below, titled "Federal Grant Analysis," show that as the School expands, the proportion of revenue from federal grants decreases relative to total revenue, and the expenditures initially supported by these grants can continue seamlessly, if opted, with the Schools' projected growth in revenue.

Explanations of Federal Grants:

Grant	Expenditure Details:
Individuals with Disabilities Education Act (Federal IDEA)	The Individuals with Disabilities Education Act Grant is utilized for salaries and benefits associated with special education (SpED).
Mental Health Average Daily Attendance (Federal MH)	The Mental Health Average Daily Attendance (Federal MH) Grant is used for salaries and benefits associated with special education (SpED).
Elementary and Secondary Education Act (Title I ESEA)	The Elementary and Secondary Education Act (Title I) Grant is used for salaries and benefits allowing Sage Oak to hire additional teachers or instructional aides to reduce classroom sizes.
Supporting Effective Instruction (Title II)	The Supporting Effective Instruction (Title II) Grant is used for professional development for teachers.
Student Support and Academic Enrichment (Title IV SSAE)	The Support and Academic Enrichment (Title IV) Grant is used to support activities and programs to help students receive a diverse and enriched academic experience.



(Continued on next page)

Federal Funds

Federal Grants:

Grant	Revenue Type	2024-25	2025-26	2026-27	2027-28
Federal IDEA	Federal IDEA	565,307	764,059	842,367	921,507
	SpED				
	SpED	58,159	58,159	58,159	58,159
Federal MH	Discretionary				
Title I	Other Federal	558,880	564,830	531,505	531,505
Title II	Other Federal	92,396	91,258	91,258	91,258
Title IV	Other Federal	47,221	47,221	47,221	47,221
Total Grants Revenue		1,321,963	1,525,527	1,570,510	1,649,650

Federal Grants Analysis:

	2024-25	2025-26	2026-27	2027-28
Total Revenue	68,973,336	78,229,111	84,200,394	94,550,421
Federal Revenue (A)	1,321,963	1,525,527	1,570,510	1,649,650
One-Time Expenses (B)	5,467,759	1,991,600		
Net Revenue (C)	142,250	420,808	1,760,800	4,253,413
Net Revenue Without Federal Grants (C - A + B)	4,288,046	886,881	190,290	2,603,763
Federal Revenue as a % of Total Revenue	1.92%	1.95%	1.87%	1.74%
Projected Total Revenue Growth		9,255,775	5,971,283	10,350,027
Projected Total Revenue Growth Percentage (see notes for details)		13.42%	7.63%	12.29%

Notes:

The school remains financially sustainable even without federal grant funding. Core operations are primarily supported by state and local funding, including ADA revenue, not reliant on federal sources. Strong fiscal management, healthy reserves, and conservative budgeting ensure the school can continue providing quality education. While some grant-funded programs may be scaled back, the loss of federal grants would not impact the school's overall financial health or ability to serve students.



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	61,828,643	55,854,391	5,974,252	10.7 %	
8012 - EPA Entitlement	1,033,760	970,840	62,920	6.5 %	
8096 - In-Lieu-Of Property Taxes	2,008,858	1,774,542	234,316	13.2 %	
Total LCFF Revenues	64,871,261	58,599,773	6,271,488	10.7 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	764,057	565,307	198,750	35.2 %	
8182 - SpEd - Discretionary Grants	58,159	58,159	0	0.0 %	
8290 - Other Federal Revenue	703,309	698,497	4,812	0.7 %	
Total Federal Revenue	1,525,525	1,321,963	203,562	15.4 %	The change is due to enrollment and ADA.
Other State Revenue					
8311 - AB602 State SpEd Revenue	4,742,522	4,355,556	386,966	8.9 %	
8550 - Mandated Cost Reimbursements	129,418	107,998	21,420	19.8 %	
8560 - Lottery- Unrestricted	1,031,134	936,938	94,196	10.1 %	
8561 - Lottery- Prop 20 - Restricted	442,685	415,740	26,945	6.5 %	
8590 - Other State Revenue	4,663,549	2,412,351	2,251,198	93.3 %	
Total Other State Revenue	11,009,308	8,228,583	2,780,725	33.8 %	The change is due to the Arts, Music, and Instructional Materials (AMIM) grant being recognized.
Local Revenue					
8660 - Interest Income	823,017	823,017	0	0.0 %	
Total Local Revenue	823,017	823,017	0	0.0 %	
Total Revenue	78,229,111	68,973,336	9,255,775	13.4 %	
Expenditures					
1000-1999 Certificated Salaries					
1001 Cert. Off Schedule Pay	0	1,861,379	(1,861,379)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
1100 Certificated Teachers Salaries	20,628,932	17,810,239	2,818,693	15.8 %	
1200 Certificated Pupil Support	7,527,864	5,912,859	1,615,005	27.3 %	
1300 Certificated Supervisors and Administrators Salaries	4,180,476	3,030,399	1,150,077	38.0 %	
Total 1000-1999 Certificated Salaries	32,337,272	28,614,876	3,722,396	13.0 %	The change is related to staffing needs aligned with student enrollment and the cost-of-living adjustment (COLA) in 2025-26.
2000-2999 Classified Salaries					
2001 Class. Off Schedule Pay	0	425,121	(425,121)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
2100 Classified Instructional Salaries	1,273,137	798,739	474,398	59.4 %	
2300 Classified Supervisors and Admin Salaries	3,451,298	3,018,458	432,840	14.3 %	
2400 Clerical, Technical and Office Salaries	3,261,652	2,774,096	487,556	17.6 %	
Total 2000-2999 Classified Salaries	7,986,087	7,016,414	969,673	13.8 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3000-3999 Employee Benefits					
3001-3002 Employee Off Schedule Benefit					
3001 - Certificated Off Schedule Pay Benefits	0	31,948	(31,948)	(100.0) %	
3002 - Classified Off Schedule Pay Benefits	0	34,010	(34,010)	(100.0) %	
Total 3001-3002 Employee Off Schedule Benefit	0	65,958	(65,958)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
3101-3102 STRS					
3101 - STRS Certificated	6,155,858	4,908,815	1,247,043	25.4 %	
Total 3101-3102 STRS	6,155,858	4,908,815	1,247,043	25.4 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	482,341	383,323	99,018	25.8 %	
3314 - Medicare - Classified	117,936	94,084	23,852	25.4 %	
3355 - OASDI - Certificated	7,334	15,606	(8,272)	(53.0) %	
3356 - OASDI - Classified	504,277	402,380	101,897	25.3 %	
Total 3301-3302 OASDI/Medicare/Alternative	1,111,888	895,393	216,495	24.2 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	3,677,957	3,077,925	600,032	19.5 %	
3402 - Health Care Classified	1,362,739	937,932	424,807	45.3 %	
Total 3401-3402 Health and Welfare Benefits	5,040,696	4,015,857	1,024,839	25.5 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	85,920	90,676	(4,756)	(5.2) %	
3502 - Unemployment Insurance Classified	38,795	38,795	0	0.0 %	
Total 3501-3502 Unemployment Insurance	124,715	129,471	(4,756)	(3.7) %	The change is related to staffing needs aligned with student enrollment.
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	116,364	92,551	23,813	25.7 %	
3602 - Workers' Comp Classified	28,469	22,700	5,769	25.4 %	
Total 3601-3602 Workers' Compensation	144,833	115,251	29,582	25.7 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3901-3922 Other Employee Benefits					
3901 - Other Benefits Cert	1,141,961	829,005	312,956	37.8 %	
3902 - Other Benefits Class	222,435	129,226	93,209	72.1 %	
3922 - 457b Employer match-Classified	777,103	377,289	399,814	106.0 %	
Total 3901-3922 Other Employee Benefits	2,141,499	1,335,520	805,979	60.3 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
Total 3000-3999 Employee Benefits	14,719,489	11,466,265	3,253,224	28.4 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	613,974	2,650,837	(2,036,863)	(76.8) %	
Total 4200 Books and Other Reference Materials	613,974	2,650,837	(2,036,863)	(76.8) %	The change is due to the purchase of additional curriculum for Oak School students, which was completed in the 2024-25 fiscal year.
4300 Materials and Supplies					
4310 - Materials & Supplies	578,302	367,080	211,222	57.5 %	The change is due to additional materials and supplies aligned with student enrollment.
4320 - Office Supplies	158,715	196,632	(37,917)	(19.3) %	The change is due to a one-time purchase of supplies for the Career and Technical Education (CTE) pathway program.
4330 - Events	67,000	12,350	54,650	442.5 %	The change is due to object code alignment for student-related art activities and events.
4350 - Other Supplies - Materials & Supplies	17,000	11,000	6,000	54.5 %	The change is due to materials and supplies needed for student graduation.
4381 - Instructional Funds - Materials	3,206,013	4,254,042	(1,048,029)	(24.6) %	The change is due to a shift in instructional funds from materials to services.
Total 4300 Materials and Supplies	4,027,030	4,841,104	(814,074)	(16.8) %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	564,700	1,216,143	(651,443)	(53.6) %	The change is due to one-time purchases of new devices for staff and students.
Total 4400 Noncapitalized Equipment	564,700	1,216,143	(651,443)	(53.6) %	
Total 4100-4799 Books, Materials, & Supplies	5,205,704	8,708,084	(3,502,380)	(40.2) %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	180,600	379,972	(199,372)	(52.5) %	
Total 5100 Subagreements for Services	180,600	379,972	(199,372)	(52.5) %	The change is due to employee recruitment rather than utilizing external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	27,399	3,000	24,399	813.3 %	The change is due to coding alignment for employee reimbursements.
5220 - Travel & Lodging	250,000	281,718	(31,718)	(11.3) %	The change is due to staff attendance at professional development conferences.
5225 - Travel & Conferences	126,000	118,910	7,090	6.0 %	The change is due to additional administrative planning sessions.
Total 5200 Travel and Conferences	403,399	403,628	(229)	(0.1) %	
5300 Dues and Memberships					
5300 - Dues & Memberships	162,641	147,073	15,568	10.6 %	
Total 5300 Dues and Memberships	162,641	147,073	15,568	10.6 %	The change is due to updated membership fees associated with professional organizations.
5400 Insurance					
5400 - Insurance	157,000	183,962	(26,962)	(14.7) %	
Total 5400 Insurance	157,000	183,962	(26,962)	(14.7) %	The change is due to a cyber liability insurance policy.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	143,200	49,660	93,540	188.4 %	
Total 5500 Operations and Housekeeping Services	143,200	49,660	93,540	188.4 %	The change is due to coding alignment for student Wi-Fi services.
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	747,700	468,703	278,997	59.5 %	The change is due to the lease of additional office and warehouse space.
5612 - Testing Site	131,630	71,272	60,358	84.7 %	The change is due to rental of assessment locations for Special Education students.
5620 - Equipment Leases	5,641	5,100	541	10.6 %	The change is due to the operating lease for the printer.
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	884,971	545,075	339,896	62.4 %	
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	267,700	143,412	124,288	86.7 %	The change is due to adjustments in marketing consultant services related to data systems.
5810 - Legal	282,000	255,000	27,000	10.6 %	The change is due to the retention of legal counsel.
5820 - Audit & CPA	60,375	55,511	4,864	8.8 %	The change is due to the updated contract for audit services.
5835 - Field Trips	138,800	86,290	52,510	60.9 %	The change is due to additional student field trips.
5840 - Advertising & Recruitment	87,000	115,885	(28,885)	(24.9) %	The change is due to advertising expenses for marketing efforts and recruitment.
5850 - Oversight Fees	1,676,300	1,515,680	160,620	10.6 %	The change is due to additional enrollment, which increases revenue and thereby oversight fees.
5860 - Service Fees	455,600	455,210	390	0.1 %	
5863 - Professional Development	984,050	302,794	681,256	225.0 %	The change is due to utilization of the AMIM Grant for teachers and staff professional development
5870 - Livescan Fingerprinting	6,580	1,327	5,253	395.9 %	The change is due to the purchase and associated maintenance fee for the Live Scan printer.
5877 - Lending Library	1,038,800	11,700	1,027,100	8,778.6 %	The change is due to additional curriculum purchases for the Lending Library.
5878 - Student Assessment	40,000	33,730	6,270	18.6 %	The change is due to the updated quote for the i-Ready assessment.
5880 - Instructional Vendors & Consultants	103,000	80,000	23,000	28.8 %	The change is due to offering college and career transition training for staff to better support students.
5881 - Instructional Funds - Services	7,480,698	6,381,065	1,099,633	17.2 %	The change is due to a shift in instructional funds from materials to services.
5883 - Outside Consultant and Services	42,000	96,000	(54,000)	(56.3) %	The change is due to contracting an outside consultant for job descriptions update.
5887 - Student Service Technology	778,106	757,279	20,827	2.8 %	The change is due to additional technology programs for students and staff.
Total 5800 Professional/Consulting Services and Operating Expend.	13,441,009	10,290,883	3,150,126	30.6 %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5900 Communications					
5930 - Postage	142,600	108,371	34,229	31.6 %	The change is due to warehouse shipping expenses.
5940 - Technology Services	1,877,671	760,457	1,117,214	146.9 %	The change is due to the number of staff and student users accessing technology applications.
Total 5900 Communications	2,020,271	868,828	1,151,443	132.5 %	
Total 5100-5999 Services & Other Operating Expenditures	17,393,091	12,869,081	4,524,010	35.2 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	166,660	156,366	10,294	6.6 %	The change is due to the depreciation of new capitalized equipment and leases.
Total Capital Expenditures	166,660	156,366	10,294	6.6 %	
Total 6100-6999 Capital Outlay	166,660	156,366	10,294	6.6 %	
Total Expenditures	77,808,303	68,831,086	8,977,217	13.0 %	
Operating Income/(Loss)	420,808	142,250	278,558	195.8 %	
Net Assets					
9791 - Beginning Fund Balance	24,723,335	23,810,579	912,756	3.8 %	
9793 - Audit Adjustments	0	770,506	(770,506)	(100.0) %	
Total Net Assets	24,723,335	24,581,085	142,250	0.6 %	
Change In Net Assets	420,808	142,250	278,558	195.8 %	
Total Net Assets	25,144,143	24,723,335	420,808	1.7 %	
Net revenue as a % of expense	0.5%	0.2%			
Fund balance as a % of expense	32.3%	35.9%			
Days of Potential Cash	118	131			



2025-26 JULY VS EA

Cash Flow Statement 2025-26

Sage Oak Charter School - Consolidated

	Year Ending 06/30/2026 2025-26 July	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending	Month Ending
--	---	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------

Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	2025-26 July Budget
Ed Effectiveness	800	5863	Professional Development	Local Teacher Trainings (Summits)	\$240,000.00
A-G Completion	802	4200	Supplemental Curriculum	AVID (5K contract/22K curriculum)	\$5,520.00
A-G Completion	802	4200	Supplemental Curriculum	A-G Curriculum and Instruction	\$5,818.69
SUPERINTENDENT	900	4320	Office Supplies	Materials and supplies	\$500.00
SUPERINTENDENT	900	4400	Non capitalized equipment	Office furniture and decor	\$10,000.00
SUPERINTENDENT	900	5220	Travel and Lodging	Conference fees/hotel/travel expenses	\$250,000.00
SUPERINTENDENT	900	5225	Travel and Conference Meals	Admin planning sessions	\$126,000.00
SUPERINTENDENT	900	5210	Travel & Mileage	Add on, Krista travel	\$12,000.00
SUPERINTENDENT	900	5800	Professional Services	Strategic planning consultant	\$90,000.00
SUPERINTENDENT	900	5810	Legal	Legal fees	\$282,000.00
HR	901	4310	Materials and Supplies	Reasonable Accommodation	\$300.00
HR	901	4320	Office Supplies	Office Events	\$2,000.00
HR	901	4320	Office Supplies	Department staff materials	\$900.00
HR	901	4320	Office Supplies	Sage Oak Shares Initiative	\$2,400.00
HR	901	4320	Office Supplies	Work Anniversary Initiative	\$9,000.00
HR	901	4320	Office Supplies	First Aid Materials and kits	\$3,315.00
HR	901	4320	Office Supplies	CPR Training	\$550.00
HR	901	4320	Office Supplies	Fire Extinguisher Inspection	\$250.00
HR	901	4320	Office Supplies	Labor Law Posters	\$250.00
HR	901	4320	Office Supplies	FRISK Manuals	\$500.00
HR	901	5210	Mileage Reimbursements	Staff Reimbursements (HR Mileage Reimbursements)	\$1,000.00
HR	901	4320	Materials and Supplies	Snacks and Beverages for in-person interviews	\$2,000.00
HR	901	5300	Dues and Memberships	SHRM & PIHRA annual membership for HR team	\$2,700.00
HR	901	5840	Advertising & Recruitment	New Hire Welcome Kits	\$11,000.00
HR	901	5840	Advertising & Recruitment	Recruitment	\$22,000.00
HR	901	5840	Advertising & Recruitment	EDJOIN	\$6,000.00
HR	901	5860	Service Fees	San Bernardino, Los Angeles, and San Diego COE STRS Consultation/Review	\$39,000.00
HR	901	5860	Service Fees	UKG	\$200,000.00
HR	901	5863	Professional Development	LOA training	\$550.00
HR	901	5863	Professional Development	Emergency/permit credential fees	\$500.00
HR	901	5863	Professional Development	PD Reimbursements	\$10,300.00
HR	901	5863	Professional Development	Teacher Induction - EOY	\$35,200.00
HR	901	5870	Livescan Fingerprinting	Livescan fees	\$3,780.00
HR	901	5870	TB reimbursement	TB Reimbursements for continuing staff	\$2,800.00
HR	901	5930	Postage	COVID Supplies & Postage	\$400.00
HR	901	5940	Operating Expenditures, Technology	Mail Merge	\$300.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
HR	901	5940	Operating Expenditures, Technology	eFax	\$300.00
HR	901	5940	Operating Expenditures, Technology	Vendor for virtual employee ID cards	\$3,000.00
Operations & Accountability	902	4320	Office Supplies (Testing Supplies)	Department member materials, student records materials, office supplies, print orders, testing supplies	\$6,600.00
Operations & Accountability	902	4320	Office Supplies	Staff meetings and interview materials and supplies	\$3,100.00
Operations & Accountability	902	5610	Facility Rents & Leases	Lodging - testing season	\$600.00
Operations & Accountability	902	5300	Dues and memberships	WASC SOCS-S affiliation request fee	\$1,400.00
Operations & Accountability	902	5300	Dues and memberships	WASC Sage Oak annual fee	\$1,400.00
Operations & Accountability	902	5300	Dues and memberships	WASC Sage Oak- Keppel annual fee	\$1,400.00
Operations & Accountability	902	5612	Testing Site	PFT site rentals, CAA 1:1 in-person testing	\$7,400.00
Operations & Accountability	902	5878	Testing Services	i-Ready -assessment and NWEA	\$40,000.00
Operations & Accountability	902	5887	Student Technology Services	DTS	\$1,000.00
Operations & Accountability	902	5940	Operating Expenditures, Technology	PARSEC premium, PARSEC reels, admin bridge fee	\$77,000.00
Secondary	904	4200	Supplemental Curriculum	Online Math Supplemental curriculum (coding)	\$2,400.00
Secondary	904	4200	Supplemental Curriculum	Kami - online access w/ Canvas PDF	\$4,800.00
Secondary	904	4200	Supplemental Curriculum	Curriculum for 30 EAs for synchronous classes	\$16,800.00
Secondary	904	4200	Supplemental Curriculum	Turn it in	\$3,500.00
Secondary	904	4200	Supplemental Curriculum	AVID (5K contract/22K curriculum)	\$25,980.00
Secondary	904	4200	Supplemental Curriculum	Pathful Curriculum	\$10,000.00
Secondary	904	4320	Office Supplies	office supplies	\$700.00
Secondary	904	4350	Other Supplies	Graduation other (decor, certificates, cords, diplomas, boxes for recognition)... etc.	\$17,000.00
Secondary	904	4381	IF Materials	Strongmind	\$265,000.00
Secondary	904	4381	IF Materials	eDynamics	\$60,000.00
Secondary	904	4381	IF Materials	Pointful Savvas Learning LLC	\$3,000.00
Secondary	904	4381	IF Materials	Avant testing service	\$250.00
Secondary	904	4381	IF Materials	Online AP curriculum	\$3,000.00
Secondary	904	4381	IF Materials	eScience Forensic kits	\$50,000.00
Secondary	904	4381	IF Materials	Mr D OPS catalog order bulking	\$102,000.00
Secondary	904	4320	Office Supplies	Dept Leadership In-Person Meeting Supplies	\$600.00
Secondary	904	5610	Facility rents and leases	Graduation site rental	\$9,000.00
Secondary	904	4381	IF Materials	Exact Path from the Edmentum Company	\$8,000.00
Secondary	904	4310	Materials and Supplies	Misc PE Supplies	\$1,852.00
Secondary	904	5835	Field Trips	CTE Pathway Capstone Trips	\$10,000.00
Stu Serv	905	4200	Supplemental Curriculum	School provided student subscriptions	\$100,000.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
Stu Serv	905	4200	Supplemental Curriculum	MTSS curriculum & materials (PAGE and MTSS Curriculum)	\$93,920.00
Stu Serv	905	4200	Supplemental Curriculum	Gate testing for - \$11/ea	\$2,000.00
Stu Serv	905	4320	Office Supplies	Office supplies	\$600.00
Stu Serv	905	4330	Events	Sage Stage/Podcast	\$17,000.00
Stu Serv	905	4320	Office Supplies	New Teacher Orientation TF/EA/Sped	\$1,400.00
Stu Serv	905	5835	Field Trips	Field Trips, events, & competitions (PAGE related items)	\$5,000.00
Stu Serv	905	5887	Student Technology Services	MTSS Tech	\$11,000.00
Stu Serv	905	5887	Student Technology Services	Verbit/Lifesigns - Deaf Interpreter	\$3,000.00
Stu Serv	905	4381	IF Materials	Bright Thinker Science Course	\$28,200.00
SPED	906	4310	Materials & Supplies	Testing Kits/Protocols	\$185,300.00
SPED	906	4310	Materials & Supplies	Independent Educational Evaluations (IEE's) (Verify with Kelly on Goal)	\$22,100.00
SPED	906	4310	Materials & Supplies	Assistive Technology	\$20,000.00
SPED	906	4310	Materials & Supplies	Moderate/Severe Curriculum//Supplemental Materials for M/M & M/S	\$15,000.00
SPED	906	4310	Materials & Supplies	Additional therapy items from related service providers	\$11,500.00
SPED	906	4310	Materials & Supplies	Materials and Supplies	\$10,500.00
SPED	906	4310	Materials & Supplies	Low Incidence Equipment (Verify with Kelly on Goal)	\$10,000.00
SPED	906	4381	Instructional Funds - Materials	Additional sped materials (Teachtown)	\$160,600.00
SPED	906	5100	SpEd Consultants	Special Education Vendors/Vendored Services	\$180,600.00
SPED	906	5610	Facility Rents, & leases	Staff meetings - 2 big meetings \$2.5K per room and 2 extra days \$500 per day)	\$6,000.00
SPED	906	5612	Testing Site	Assessment location rentals	\$124,230.09
SPED	906	5860	Service Fees	Sonoma Selpa Fee	\$212,100.00
SPED	906	5887	Operating Expenditures, Student Service Technology	Goalbook/SLP Toolkit	\$27,800.00
Bus Serv	907	4320	Office Supplies	Office materials/supplies	\$27,000.00
Bus Serv	907	5800	Professional Services	Board stipends	\$52,200.00
Bus Serv	907	5210	Mileage Reimbursements	Mileage reimbursements for all staff	\$8,000.00
Bus Serv	907	5300	Dues and memberships	CASBO organizational membership	\$3,500.00
Bus Serv	907	5300	Dues and Memberships	School Services of CA, Membership	\$4,500.00
Bus Serv	907	5300	Dues and Memberships	APlus+ Membership +\$5,000	\$30,000.00
Bus Serv	907	5300	Dues and Memberships	CSDC Membership	\$20,800.00
Bus Serv	907	5300	Dues and Memberships	CCSA Membership	\$83,200.00
Bus Serv	907	5300	Dues and Memberships	SSDA Membership	\$2,000.00
Bus Serv	907	5300	Dues and Memberships	ACSA Membership	\$9,000.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
Bus Serv	907	5400	Insurance	Liability and Property Insurance	\$157,000.00
Bus Serv	907	5510	Operating Expenditures, Utilities	Utilities: SCE, Frontier, ADT, Janitoial	\$50,000.00
Bus Serv	907	5610	Facility rents and leases	Office lease (all three spaces) ALL COSTS	\$526,800.00
Bus Serv	907	5610	Facility rents and leases	New location for bigger meeting space plus furniture and decor	\$165,000.00
Bus Serv	907	5800	Professional Services	Training opportunities in Intacct	\$2,500.00
Bus Serv	907	5820	Audit & CPA	CLA Audit	\$60,375.00
Bus Serv	907	5850	Authorizor oversight fee	Sage Oak (3%)	\$1,541,914.00
Bus Serv	907	5850	Authorizor oversight fee	Sage Oak - Keppel (1%)	\$58,047.00
Bus Serv	907	5850	Authorizor oversight fee	Sage Oak - South (1%)	\$76,339.00
Bus Serv	907	5860	Professional Service Fees	Environmental Fee CDTFA	\$3,000.00
Bus Serv	907	5860	Professional Service Fees	Tax1099.com /e-file platform for 1099s	\$1,500.00
Bus Serv	907	5863	Professional Development	Business related books and subscriptions	\$500.00
Bus Serv	907	5877	Lending Library	Vehicle Rentals	\$7,000.00
Bus Serv	907	5930	Postage	UPS	\$140,000.00
Bus Serv	907	5940	Operating Expenditures, Technology	Amazon Prime	\$4,000.00
Bus Serv	907	5940	Operating Expenditures, Technology	Sage Intacct, System and users	\$67,150.00
Bus Serv	907	5940	Operating Expenditures, Technology	Stampli	\$80,000.00
Bus Serv	907	6901	Depreciation	Depreciation Expense-Leasehold improvements	\$90,400.00
Bus Serv	907	5210	Mileage Reimbursements	Board Mileage	\$3,000.00
Bus Serv	907	4320	Office Supplies	Warehouse supplies/materials	\$22,000.00
Bus Serv	907	5300	Dues and Memberships	AASA Membership (L.K.)	\$215.00
Virtual Academy Program	911	4200	Supplemental Curriculum	EdPuzzle	\$2,690.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Blooket	\$1,800.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Classroom Screen	\$525.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Raz Kids	\$1,750.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Generation Genius TK-8	\$3,590.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Mystery Science TK-5	\$1,680.00
Virtual Academy Program	911	4200	Supplemental Curriculum	TK-5 ELA Materials	\$55,000.00
Virtual Academy Program	911	4200	Supplemental Curriculum	StudySync 3YR 6-8	\$24,500.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Envision: TK-8 Math	\$50,000.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Inspire Science 3YR 6-8	\$46,500.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Home Science Tools Lab Kits	\$48,000.00
Virtual Academy Program	911	4200	Supplemental Curriculum	QSL Lab Kits 6-8	\$20,000.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Studies Weekly TK-5	\$16,200.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
Virtual Academy Program	911	4200	Supplemental Curriculum	TCi History Alive 6-8	\$11,000.00
Virtual Academy Program	911	4310	Materials and Supplies	Student and Teacher School Supplies	\$230,000.00
Virtual Academy Program	911	4310	Materials and Supplies	Amazon Supplies for Oakschool Courses	\$35,000.00
Virtual Academy Program	911	4310	Materials and Supplies	Teachers Pay Teachers Digital Curriculum Purchases	\$1,550.00
Virtual Academy Program	911	4310	Materials and Supplies	Dept Leadership In-Person Meetings - Materials and Supplies	\$3,000.00
Virtual Academy Program	911	5610	Facility rents and leases	Site rentals for in person PLC meetings and VLA Meetings	\$5,000.00
Virtual Academy Program	911	5835	Field Trips	School Wide Field Trips and Events	\$100,000.00
Virtual Academy Program	911	5930	Postage	Stamps for Teachers	\$2,200.00
PLA	912	4200	Supplemental Curriculum	PLT+ Curriculum	\$14,500.00
PLA	912	4200	Supplemental Curriculum	Curriculum for Prop 28 Art Program	\$23,000.00
PLA	912	4330	Supplemental Curriculum	Activities for Prop 28 Art Activities & Events	\$50,000.00
PLA	912	4310	Materials and Supplies	Regional Mentor Materials for PLCs	\$1,200.00
PLA	912	4320	Office Supplies	In-Person Events and Supplies	\$28,000.00
PLA	912	5610	Facility rents and leases	Regional Mentor - one day in person meeting - hotel rooms	\$1,700.00
PLA	912	4320	Office Supplies	Staff shirts/lanyards for teachers	\$10,000.00
PLA	912	4320	Office Supplies	Regional Mentor - one day in person meeting - food	\$1,400.00
PLA	912	5610	Facility rents and leases	Regional Mentor - one day in person meeting - room rental	\$1,600.00
PLA	912	5610	Facility rents and leases	PLC/Event Permits/Rents	\$32,000.00
PLA	912	5835	Field Trips	Field Trip Supplies	\$800.00
PLA	912	5881	Instructional Services	Field Trips (instructional funds)	\$225,000.00
IT	914	4320	Office Supplies	Misc tech supplies	\$21,000.00
IT	914	4400	Non capitalized equipment	MiFis (mobile beacon and digital wish) devices	\$2,000.00
IT	914	4400	Non capitalized equipment	New staff technology	\$140,000.00
IT	914	5883	Outside Consultant and Services	Computer repairs (outside contractor services)	\$7,000.00
IT	914	4400	Non capitalized equipment	Replace obsolete devices	\$340,000.00
IT	914	4400	Non capitalized equipment	Chromebooks Note: Student Chromebooks should code to function 1000 Teacher Chromebooks should code to function 2490	\$59,700.00
IT	914	5887	Student Technology Services	Zoom Video Communications, Inc. Note: Student should code to 5887 Admin Staff should code to 5940	\$26,680.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
IT	914	5887	Student Technology Services	Jamf Software	\$16,900.00
IT	914	5887	Student Technology Services	DocuSign	\$18,500.00
IT	914	5887	Student Technology Services	MS Office licensing Note: Admin Staff should GL account code to 5940	\$10,000.00
IT	914	5887	Student Technology Services	Adobe licensing	\$7,800.00
IT	914	5940	Operating Expenditures, Technology	Web Hosting / development	\$25,000.00
IT	914	5887	Student Technology Services	Monitoring tool for student G-suite (managed methods & Gsuite standard)	\$18,400.00
IT	914	5887	Student Technology Services	Lightspeed web filtering	\$81,536.00
IT	914	5887	Student Technology Services	Incident IQ help desk/inventory system	\$27,590.00
IT	914	5887	Student Technology Services	Backup/disaster recovery	\$5,800.00
IT	914	5887	Student Technology Services	Board on Track	\$5,500.00
IT	914	5887	Student Technology Services	Various outside contractors	\$265,720.00
IT	914	5887	Student Technology Services	Zapier Software	\$2,800.00
IT	914	5887	Student Technology Services	Scribe	\$13,600.00
IT	914	5887	Student Technology Services	Wisestamp	\$4,000.00
IT	914	5887	Student Technology Services	LiveChat	\$1,300.00
IT	914	5887	Student Technology Services	Hapara	\$9,630.00
IT	914	5887	Student Technology Services	SEIS / SIS integration	\$900.00
IT	914	5887	Student Technology Services	Instructure Services (CANVAS)	\$44,000.00
IT	914	5887	Student Technology Services	MagicSchool.AI	\$26,000.00
IT	914	5887	Student Technology Services	SkillStruck	\$5,100.00
IT	914	5887	Student Technology Services	YellowFolder	\$22,400.00
IT	914	5887	Student Technology Services	OpenAi (ChatGPT Team Account)	\$19,000.00
IT	914	5940	Operating Expenditures, Technology	Server costs (AWS)	\$50,000.00
IT	914	5940	Operating Expenditures, Technology	OPS software	\$73,600.00
IT	914	5940	Operating Expenditures, Technology	School Pathways	\$174,400.00
IT	914	5940	Operating Expenditures, Technology	Finalsite/school admin enrollment	\$49,800.00
IT	914	5940	Operating Expenditures, Technology	Clever	\$12,460.00
IT	914	5940	Operating Expenditures, Technology	Red Herring	\$400.00
IT	914	5940	Operating Expenditures, Technology	Splashtop	\$400.00
IT	914	5940	Operating Expenditures, Technology	Networks and network monitoring	\$10,500.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
IT	914	5940	Operating Expenditures, Technology	Amplified IT	\$6,600.00
IT	914	5940	Operating Expenditures, Technology	Fortinet email filtering	\$43,605.50
IT	914	5940	Operating Expenditures, Technology	Google Workspace for Education Standard	\$17,437.00
IT	914	5940	Operating Expenditures, Technology	iTopia	\$16,599.00
IT	914	5940	Operating Expenditures, Technology	SCHED	\$1,800.00
IT	914	5940	Operating Expenditures, Technology	XCITIUM	\$10,000.00
IT	914	5940	Operating Expenditures, Technology	Grammarly	\$4,600.00
IT	914	5940	Operating Expenditures, Technology	Chatbase	\$4,400.00
IT	914	5940	Operating Expenditures, Technology	AWS data lake development	\$165,900.00
IT	914	5940	Operating Expenditures, Technology	KnowB4	\$8,052.00
Community Outreach	915	4320	Office Supplies	Office Supplies (business cards, printed materials, etc.)	\$1,000.00
Community Outreach	915	5210	Travel & Mileage	Authorizer Meetings/Travel Expenses	\$3,400.00
Community Outreach	915	5800	Professional Services	Marketing Consultants (Design Pickle)	\$20,000.00
Community Outreach	915	5800	Professional Services	Podcast/Production Outside Services	\$32,000.00
Community Outreach	915	5800	Professional Services	Crisis Communication	\$5,000.00
Community Outreach	915	4310	Materials & Supplies	Marketing Supplies	\$10,500.00
Community Outreach	915	5840	Advertising	PPC pay-per-click enrollment marketing campaign	\$13,000.00
Community Outreach	915	5840	Advertising	Videos for marketing the school	\$35,000.00
Community Outreach	915	5887	Technology Services	Mailchimp	\$2,550.00
Fiscal Serv	916	4320	Office Supplies	Misc. office materials and supplies	\$350.00
Fiscal Serv	916	4320	Office Supplies	Printing costs for interims and year-end reports are to be given to authorizers.	\$1,200.00
Fiscal Serv	916	4320	Office Supplies	Interims and Year-End Huddle meetings and Recap roundtable	\$800.00
AMIM	812	4200	Operating Expenditures, Technology	IGOE FSA Fees	\$21,600.00
AMIM	812	5800	Professional Services - non instructional	RCOE Data and Analytics Administrator (Kerry Bobbit) - 3yr contract	\$15,000.00
AMIM	812	5835	Field Trips	Field Trip - Overnight stay to Pali	\$11,000.00
AMIM	812	5835	Field Trips	Field Trip - Sacramento Student Participation increase	\$9,000.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
AMIM	812	5863	Professional Development	Conferences for teachers	\$520,000.00
AMIM	812	5863	Professional Development	DLAC and LRP 2026 Conference	\$100,000.00
AMIM	812	5863	Professional Development	Hotel room costs - August Summit	\$45,000.00
AMIM	812	5877	Lending Library	Lending Library - materials	\$1,031,800.00
AMIM	812	5880	Instructional vendors and consultants	College training from an expert on college/career transitioning (who will be the vendor).	\$100,000.00
AMIM	812	5887	Student Technology Services	Hapara - SpED students	\$8,000.00
AMIM	812	5887	Student Technology Services	Mastery Connect	\$46,000.00
AMIM	812	5887	Student Technology Services	Cidi Labs - instructional design tool for Canvas	\$16,600.00
AMIM	812	5940	Operating Expenditures, Technology	Google Workspace for Education Plus	\$17,437.00
AMIM	812	5940	Operating Expenditures, Technology	Tutor.com	\$80,000.00
AMIM	812	5940	Operating Expenditures, Technology	Research & Development for AI Agents	\$100,000.00
AMIM	812	5940	Operating Expenditures, Technology	Evaluation software subscription - Program to move teacher & support staff evaluations from spreadsheets to an online platform (Vendor?)	\$55,000.00
Bus Serv	907	5300	Dues and Memberships	Digital Learning Membership	\$125.00
Bus Serv	907	5300	Dues and Memberships	National Honor Society Fees	\$2,400.00
Bus Serv	907	6901	Depreciation	Depreciation Expense - Vehicles	\$76,260.00
HR	901	5620	Rentals, Leases, and Repairs	Konica Minolta 5 year operating lease	\$5,641.00
HR	901	5883	Outside Consultants	Consulting agency for JD update	\$35,000.00
IT	914	4400	Non capitalized equipment	RFID System	\$13,000.00
IT	914	5510	Utilities	MiFis (mobile beacon and digital wish) / T-Mobile hotspots / cell phone monthly service fee	\$93,200.00
IT	914	5887	Student Technology Services	Genially	\$200.00
IT	914	5887	Student Technology Services	Gimkit	\$1,000.00
IT	914	5887	Student Technology Services	Minecraft	\$5,600.00
IT	914	5887	Student Technology Services	Grade Guardian	\$9,000.00
IT	914	5887	Student Technology Services	Otter AI (for leadership team)	\$13,200.00
IT	914	5940	Operating Expenditures, Technology	ID Card Software (ID Cards for Students)	\$250.00
IT	914	5940	Operating Expenditures, Technology	Parallels	\$1,800.00
IT	914	5940	Operating Expenditures, Technology	Bitwarden	\$450.00
IT	914	5940	Operating Expenditures, Technology	ClickUp	\$46,050.00



Comprehensive Department Budget

Department	Dpt Code	Object Code	Object Description	Items	Budget
IT	914	5940	Operating Expenditures, Technology	Descript Pro	\$960.00
IT	914	5940	Operating Expenditures, Technology	Gemini	\$14,400.00
IT	914	5940	Operating Expenditures, Technology	Mailgun	\$420.00
IT	914	5940	Operating Expenditures, Technology	ZoHo	\$3,600.00
Operations & Accountability	902	5800	Professional Services	ScubaCat Educational Data, LLC (Rachel Hatch)	\$50,000.00
Operations & Accountability	902	5800	Professional Services	Hearing Officer	\$1,000.00
Operations & Accountability	902	5863	Professional Development	Dyslexia Initiative Grant (literacy screening PD)	\$32,000.00
PLA	912	4310	Materials and Supplies	Activities for Prop 28 Art - Material & Supplies	\$7,000.00
PLA	912	5835	Field Trips	Oakschool Field Trips	\$3,000.00
Secondary	904	5880	Instructional Vendors & Consultants	PE Activities	\$3,000.00
SPED	906	4320	Office Materials	Staff meetings - supplies and materials	\$11,300.00
Stu Serv	905	4310	Materials and Supplies	Gate Materials	\$1,000.00
Virtual Academy Program	911	4200	Supplemental Curriculum	Delta Math	\$900.00
Virtual Academy Program	911	4310	Materials and Supplies	School-wide Teacher/Student event materials & supplies.	\$12,500.00





Sage Oak Charter School 2025-26 July Budget



Summary Analysis

Sage Oak Charter School

Summary of Results

The 2025-26 July Budget projects a net revenue of \$0.33M. Net revenue changed by \$0.21M from the 2024-25 Estimated Actuals (EA) of \$0.11M. Positive net revenue and a strong reserve balance will allow Sage Oak Charter Schools to end the 2025-26 fiscal year with a reserve of \$18.36M, which is 29.7% of annual expenditures.

Cash Flow

In the budgeted year's cash flow analysis, it was observed that the cash is projected to reach its lowest point at the end of June 2026, with \$15.54M cash on hand. The cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Changes to Revenue

The 13.8% change in revenue from the 2024-25 EA to the 2025-26 July Budget is due to additional LCFF, federal, and state revenues. Student average-daily-attendance (ADA) changed from 3,842 in the 2024-25 EA Budget to 4,097 in the 2025-26 July Budget.

Changes to Expenditures

Sage Oak has an overall change of 13.4% in expenditures from the 2024-25 EA to the 2025-26 July Budget. The change can be attributed to staffing, services, and materials for students, aligned with student enrollment.



Enrollment and ADA Assumptions

Sage Oak Charter School

2025-26	Enrollment	ADA	Unduplicated Pupil Percentage (UPP)
TK-3	1,765	1,754	
4-6	1,017	1,011	
7-8	621	617	
9-12	719	715	
Total	4,122	4,097	1,755

Growth 6.4% 99.4% 42.6%

2026-27	Enrollment	ADA	UPP
TK-3	1,935	1,919	
4-6	1,115	1,106	
7-8	681	676	
9-12	788	782	
Total	4,519	4,483	1,924

Growth 9.6% 99.2% 42.6%

2027-28	Enrollment	ADA	UPP
TK-3	2,104	2,087	
4-6	1,213	1,203	
7-8	741	735	
9-12	857	850	
Total	4,915	4,875	2,093

Growth 8.8% 99.2% 42.6%



2025-26 JULY vs EA - Summary

Sage Oak Charter School

	2025-26 July	2024-25 EA	\$ Change	% Change
Revenue				
LCFF Revenue				
Total LCFF Revenues	51,435,204	46,394,393	5,040,811	10.9 %
Total Federal Revenue	1,204,604	1,031,966	172,638	16.7 %
Total Other State Revenue	8,744,821	6,431,123	2,313,698	36.0 %
Total Local Revenue	745,530	745,530	0	0.0 %
Total Revenue	62,130,159	54,603,012	7,527,147	13.8 %
Expenditures				
Total 1000-1999 Certificated Salaries	25,685,757	22,872,285	2,813,472	12.3 %
Total 2000-2999 Classified Salaries	6,284,821	5,667,561	617,260	10.9 %
Total 3100-3999 Employee Benefits	11,642,033	9,128,512	2,513,521	27.5 %
Total 4100-4799 Books, Materials, & Supplies	4,093,391	6,640,957	(2,547,566)	(38.4) %
Total 5100-5999 Services & Other Operating Expenditures	13,964,867	10,062,449	3,902,418	38.8 %
Total 6100-6999 Capital Outlay	131,028	119,229	11,799	9.9 %
Total Expenditures	61,801,897	54,490,993	7,310,904	13.4 %
Operating Income/(Loss)	328,262	112,019	216,243	193.0 %
Net Assets				
9791 - Beginning Fund Balance	18,028,338	17,341,943	686,395	4.0 %
9793 - Audit Adjustments	0	574,376	(574,376)	(100.0) %
Total Net Assets	18,028,338	17,916,319	112,019	0.6 %
Change In Net Assets	328,262	112,019	216,243	193.0 %
Total Net Assets	18,356,600	18,028,338	328,262	1.8 %
Net revenue as a % of expense	0.5 %	0.2 %		
Fund balance as a % of expense	29.7 %	33.1 %		
Days of Potential Cash	108	121		



2025-26 JULY vs EA - Detail

Sage Oak Charter School

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	49,904,896	44,915,205	4,989,691	11.1 %	
8012 - EPA Entitlement	819,454	768,334	51,120	6.7 %	
8096 - In-Lieu-Of Property Taxes	710,854	710,854	0	0.0 %	
Total LCFF Revenues	51,435,204	46,394,393	5,040,811	10.9 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	605,622	445,049	160,573	36.1 %	
8182 - SpEd - Discretionary Grants	37,798	37,798	0	0.0 %	
8290 - Other Federal Revenue	561,184	549,119	12,065	2.2 %	
Total Federal Revenue	1,204,604	1,031,966	172,638	16.7 %	The change is due to enrollment and ADA.
Other State Revenue					
8311 - AB602 State SpEd Revenue	3,759,361	3,436,281	323,080	9.4 %	
8550 - Mandated Cost Reimbursements	103,584	86,990	16,594	19.1 %	
8560 - Lottery- Unrestricted	817,372	766,377	50,995	6.7 %	
8561 - Lottery- Prop 20 - Restricted	350,913	329,022	21,891	6.7 %	
8590 - Other State Revenue	3,713,591	1,812,453	1,901,138	104.9 %	
Total Other State Revenue	8,744,821	6,431,123	2,313,698	36.0 %	The change is due to the Arts, Music, and Instructional Materials (AMIM) grant being recognized.
Local Revenue					
8660 - Interest Income	745,530	745,530	0	0.0 %	
Total Local Revenue	745,530	745,530	0	0.0 %	
Total Revenue	62,130,159	54,603,012	7,527,147	13.8 %	
Expenditures					
1000-1999 Certificated Salaries					
1001 Cert. Off Schedule Pay	0	1,505,856	(1,505,856)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
1100 Certificated Teachers Salaries	16,480,660	14,156,174	2,324,486	16.4 %	
1200 Certificated Pupil Support	5,918,407	4,759,889	1,158,518	24.3 %	
1300 Certificated Supervisors and Administrators Salaries	3,286,690	2,450,366	836,324	34.1 %	
Total 1000-1999 Certificated Salaries	25,685,757	22,872,285	2,813,472	12.3 %	The change is related to staffing needs aligned with student enrollment and the cost-of-living adjustment (COLA) in 2025-26.
2000-2999 Classified Salaries					
2001 Class. Off Schedule Pay	0	343,923	(343,923)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
2100 Classified Instructional Salaries	1,007,099	643,082	364,017	56.6 %	
2300 Classified Supervisors and Admin Salaries	2,713,411	2,440,095	273,316	11.2 %	
2400 Clerical, Technical and Office Salaries	2,564,311	2,240,461	323,850	14.5 %	
Total 2000-2999 Classified Salaries	6,284,821	5,667,561	617,260	10.9 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3000-3999 Employee Benefits					
3001-3002 Employee Off Schedule Benefit					
3001 - Certificated Off Schedule Pay Benefits	0	25,846	(25,846)	(100.0) %	
3002 - Classified Off Schedule Pay Benefits	0	27,514	(27,514)	(100.0) %	
Total 3001-3002 Employee Off Schedule Benefit	0	53,360	(53,360)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
3101-3102 STRS					
3101 - STRS Certificated	4,889,751	3,922,806	966,945	24.6 %	
Total 3101-3102 STRS	4,889,751	3,922,806	966,945	24.6 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.



2025-26 JULY vs EA - Detail

Sage Oak Charter School

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	383,130	306,254	76,876	25.1 %	
3314 - Medicare - Classified	92,813	75,979	16,834	22.2 %	
3355 - OASDI - Certificated	5,766	13,083	(7,317)	(55.9) %	
3356 - OASDI - Classified	396,858	324,953	71,905	22.1 %	
Total 3301-3302 OASDI/Medicare/Alternative	878,567	720,269	158,298	22.0 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	2,891,581	2,413,054	478,527	19.8 %	
3402 - Health Care Classified	1,073,863	757,194	316,669	41.8 %	
Total 3401-3402 Health and Welfare Benefits	3,965,444	3,170,248	795,196	25.1 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	68,324	71,996	(3,672)	(5.1) %	
3502 - Unemployment Insurance Classified	30,625	31,286	(661)	(2.1) %	
Total 3501-3502 Unemployment Insurance	98,949	103,282	(4,333)	(4.2) %	The change is related to staffing needs aligned with student enrollment.
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	92,430	73,943	18,487	25.0 %	
3602 - Workers' Comp Classified	22,405	18,344	4,061	22.1 %	
Total 3601-3602 Workers' Compensation	114,835	92,287	22,548	24.4 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3901-3922 Other Employee Benefits					
3901 - Other Benefits Cert	907,821	657,382	250,439	38.1 %	
3902 - Other Benefits Class	175,144	104,230	70,914	68.0 %	
3922 - 457b Employer match-Classified	611,522	304,648	306,874	100.7 %	
Total 3901-3922 Other Employee Benefits	1,694,487	1,066,260	628,227	58.9 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
Total 3000-3999 Employee Benefits	11,642,033	9,128,512	2,513,521	27.5 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	483,373	2,022,290	(1,538,917)	(76.1) %	
Total 4200 Books and Other Reference Materials	483,373	2,022,290	(1,538,917)	(76.1) %	The change is due to the purchase of additional curriculum for Oak School students, which was completed in the 2024-25 fiscal year.
4300 Materials and Supplies					
4310 - Materials & Supplies	454,661	279,915	174,746	62.4 %	The change is due to additional materials and supplies aligned with student enrollment.
4320 - Office Supplies	124,782	149,931	(25,149)	(16.8) %	The change is due to a one-time purchase of supplies for the Career and Technical Education (CTE) pathway program.
4330 - Meals	52,675	9,417	43,258	459.4 %	The change is due to object code alignment for student-related art activities and events.
4350 - Other Supplies - Materials & Supplies	13,366	8,388	4,978	59.3 %	The change is due to materials and supplies needed for student graduation.
4381 - Instructional Funds - Materials	2,520,567	3,243,707	(723,140)	(22.3) %	The change is due to a shift in instructional funds from materials to services.
Total 4300 Materials and Supplies	3,166,051	3,691,358	(525,307)	(14.2) %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	443,967	927,309	(483,342)	(52.1) %	The change is due to one-time purchases of new devices for staff and students.
Total 4400 Noncapitalized Equipment	443,967	927,309	(483,342)	(52.1) %	
Total 4100-4799 Books, Materials, & Supplies	4,093,391	6,640,957	(2,547,566)	(38.4) %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	141,988	289,729	(147,741)	(51.0) %	
Total 5100 Subagreements for Services	141,988	289,729	(147,741)	(51.0) %	The change is due to employee recruitment rather than utilizing external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	21,542	2,287	19,255	841.9 %	The change is due to coding alignment for employee reimbursements.
5220 - Travel & Lodging	196,550	214,810	(18,260)	(8.5) %	The change is due to staff attendance at professional development conferences.
5225 - Travel & Conferences	99,061	90,669	8,392	9.3 %	The change is due to additional administrative planning sessions.
Total 5200 Travel and Conferences	317,153	307,766	9,387	3.1 %	
5300 Dues and Memberships					
5300 - Dues & Memberships	127,867	112,143	15,724	14.0 %	
Total 5300 Dues and Memberships	127,867	112,143	15,724	14.0 %	The change is due to updated membership fees associated with professional organizations.
5400 Insurance					
5400 - Insurance	123,434	140,271	(16,837)	(12.0) %	
Total 5400 Insurance	123,434	140,271	(16,837)	(12.0) %	The change is due to a cyber liability insurance policy.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	112,584	37,866	74,718	197.3 %	
Total 5500 Operations and Housekeeping Services	112,584	37,866	74,718	197.3 %	The change is due to coding alignment for student Wi-Fi services.
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	587,842	357,386	230,456	64.5 %	The change is due to the lease of additional office and warehouse space.
5612 - Testing Site	103,487	54,345	49,142	90.4 %	The change is due to rental of assessment locations for Special Education students.
5620 - Equipment Leases	4,435	3,889	546	14.0 %	The change is due to the operating lease for the printer.
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	695,764	415,620	280,144	67.4 %	
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	210,929	109,351	101,578	92.9 %	The change is due to adjustments in marketing consultant services related to data systems.
5810 - Legal	221,709	194,438	27,271	14.0 %	The change is due to the retention of legal counsel.
5820 - Audit & CPA	47,466	42,327	5,139	12.1 %	The change is due to the updated contract for audit services.
5835 - Field Trips	109,743	65,796	43,947	66.8 %	The change is due to additional student field trips.
5840 - Advertising & Recruitment	68,400	88,362	(19,962)	(22.6) %	The change is due to advertising expenses for marketing efforts and recruitment.
5850 - Oversight Fees	1,541,914	1,394,345	147,569	10.6 %	The change is due to additional enrollment, which increases revenue and thereby oversight fees.
5860 - Service Fees	358,192	347,098	11,094	3.2 %	The change is due to an environmental fee.
5863 - Professional Development	794,209	241,631	552,578	228.7 %	The change is due to utilization of the AMIM Grant for teachers and staff professional development
5870 - Livescan Fingerprinting	5,173	1,012	4,161	411.2 %	The change is due to the purchase and associated maintenance fee for the Live Scan printer.
5877 - Lending Library	848,587	8,921	839,666	9,412.2 %	The change is due to additional curriculum purchases for the Lending Library.
5878 - Student Assessment	31,448	25,720	5,728	22.3 %	The change is due to the updated quote for the i-Ready assessment.
5880 - Instructional Vendors & Consultants	84,069	61,000	23,069	37.8 %	The change is due to offering college and career transition training for staff to better support students.
5881 - Instructional Funds - Services	5,881,325	4,865,561	1,015,764	20.9 %	The change is due to a shift in instructional funds from materials to services.
5883 - Outside Consultant and Services	33,020	73,200	(40,180)	(54.9) %	The change is due to contracting an outside consultant for job descriptions update.
5887 - Student Service Technology	613,756	577,811	35,945	6.2 %	The change is due to additional technology programs for students and staff.
Total 5800 Professional/Consulting Services and Operating Expend.	10,849,940	8,096,573	2,753,367	34.0 %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5900 Communications					
5930 - Postage	112,112	82,633	29,479	35.7 %	The change is due to warehouse shipping expenses.
5940 - Technology Services	1,484,025	579,848	904,177	155.9 %	The change is due to the number of staff and student users accessing technology applications.
Total 5900 Communications	1,596,137	662,481	933,656	140.9 %	
Total 5100-5999 Services & Other Operating Expenditures	13,964,867	10,062,449	3,902,418	38.8 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	131,028	119,229	11,799	9.9 %	The change is due to the depreciation of new capitalized equipment and leases.
Total Capital Expenditures	131,028	119,229	11,799	9.9 %	
Total 6100-6999 Capital Outlay	131,028	119,229	11,799	9.9 %	
Total Expenditures	61,801,897	54,490,993	7,310,904	13.4 %	
Operating Income/(Loss)	328,262	112,019	216,243	193.0 %	
Net Assets					
9791 - Beginning Fund Balance	18,028,338	17,341,943	686,395	4.0 %	
9793 - Audit Adjustments	0	574,376	(574,376)	(100.0) %	
Total Net Assets	18,028,338	17,916,319	112,019	0.6 %	
Change In Net Assets	328,262	112,019	216,243	193.0 %	
Total Net Assets	18,356,600	18,028,338	328,262	1.8 %	
Net revenue as a % of expense	0.5 %	0.2 %			
Fund balance as a % of expense	29.7 %	33.1 %			
Days of Potential Cash	108	121			



2025-26 JULY vs EA - MYP Summary

Sage Oak Charter School

Enrollment	4,122	4,519	4,915
ADA	4,097	4,483	4,875
COLA	2.30 %	3.52 %	3.63 %

	2025-26 July	2026-27	2027-28
Revenue			
Total LCFF Revenues	51,435,204	58,243,935	65,650,053
Total Federal Revenue	1,204,604	1,234,795	1,297,634
Total Other State Revenue	8,744,821	6,623,347	7,368,952
Total Local Revenue	745,530	745,530	745,530
Total Revenue	62,130,159	66,847,607	75,062,169
Expenditures			
Total 1000-1999 Certificated Salaries	25,685,757	28,254,331	30,481,020
Total 2000-2999 Classified Salaries	6,284,821	6,913,303	7,673,767
Total 3100-3999 Employee Benefits	11,642,033	12,466,898	13,586,295
Total 4100-4799 Books, Materials, & Supplies	4,093,391	4,481,005	4,994,721
Total 5100-5999 Services & Other Operating Expenditures	13,964,867	13,201,591	14,548,722
Total 6100-6999 Capital Outlay	131,028	155,400	157,634
Total Expenditures	61,801,897	65,472,528	71,442,159
Operating Income/(Loss)	328,262	1,375,079	3,620,010
Net Assets			
9791 - Beginning Fund Balance	18,028,338	18,356,600	19,731,679
Total Net Assets	18,028,338	18,356,600	19,731,679
Change In Net Assets	328,262	1,375,079	3,620,010
Total Net Assets	18,356,600	19,731,679	23,351,689

Net revenue as a % of expense	0.5 %	2.1 %	5.1 %
Fund balance as a % of expense	29.7 %	30.1 %	32.7 %
Days of Potential Cash	108	110	119



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School

	2025-26 July	2026-27	2027-28
Revenue			
LCFF Revenue			
8011 - LCFF General Entitlement	49,904,896	56,636,511	63,964,000
8012 - EPA Entitlement	819,454	896,570	975,199
8096 - In-Lieu-Of Property Taxes	710,854	710,854	710,854
Total LCFF Revenues	51,435,204	58,243,935	65,650,053
Federal Revenue			
8181 - Federal IDEA SpEd Revenue	605,622	667,738	730,577
8182 - SpEd - Discretionary Grants	37,798	37,798	37,798
8290 - Other Federal Revenue	561,184	529,259	529,259
Total Federal Revenue	1,204,604	1,234,795	1,297,634
Other State Revenue			
8311 - AB602 State SpEd Revenue	3,759,361	4,257,924	4,799,153
8550 - Mandated Cost Reimbursements	103,584	114,267	129,484
8560 - Lottery- Unrestricted	817,372	894,292	972,658
8561 - Lottery- Prop 20 - Restricted	350,913	383,937	417,581
8590 - Other State Revenue	3,713,591	972,927	1,050,076
Total Other State Revenue	8,744,821	6,623,347	7,368,952
Local Revenue			
8660 - Interest Income	745,530	745,530	745,530
Total Local Revenue	745,530	745,530	745,530
Total Revenue	62,130,159	66,847,607	75,062,169
Expenditures			
1000-1999 Certificated Salaries			
1100 Certificated Teachers Salaries	16,480,660	18,128,723	19,241,595
1200 Certificated Pupil Support	5,918,407	6,510,248	7,226,375
1300 Certificated Supervisors and Administrators Salaries	3,286,690	3,615,360	4,013,050
Total 1000-1999 Certificated Salaries	25,685,757	28,254,331	30,481,020
2000-2999 Classified Salaries			
2100 Classified Instructional Salaries	1,007,099	1,107,809	1,229,668
2300 Classified Supervisors and Admin Salaries	2,713,411	2,984,752	3,313,075
2400 Clerical, Technical and Office Salaries	2,564,311	2,820,742	3,131,024
Total 2000-2999 Classified Salaries	6,284,821	6,913,303	7,673,767



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School

	2025-26 July	2026-27	2027-28
3101-3102 STRS			
3101 - STRS Certificated	4,889,751	5,396,578	5,955,576
Total 3101-3102 STRS	4,889,751	5,396,578	5,955,576
3301-3302 OASDI/Medicare/Alternative			
3313 - Medicare - Certificated	383,130	420,539	463,587
3314 - Medicare - Classified	92,813	101,985	113,203
3355 - OASDI - Certificated	5,766	6,343	7,041
3356 - OASDI - Classified	396,858	436,543	484,562
Total 3301-3302 OASDI/Medicare/Alternative	878,567	965,410	1,068,393
3401-3402 Health and Welfare Benefits			
3401 - Health Care Certificated	2,891,581	2,992,787	3,162,951
3402 - Health Care Classified	1,073,863	1,111,446	1,233,705
Total 3401-3402 Health and Welfare Benefits	3,965,444	4,104,233	4,396,656
3501-3502 Unemployment Insurance			
3501 - Unemployment Insurance Certificated	68,324	70,717	74,819
3502 - Unemployment Insurance Classified	30,625	31,696	35,183
Total 3501-3502 Unemployment Insurance	98,949	102,413	110,002
3601-3602 Workers' Compensation			
3601 - Workers' Comp Certificated	92,430	101,509	111,899
3602 - Workers' Comp Classified	22,405	24,617	27,325
Total 3601-3602 Workers' Compensation	114,835	126,126	139,224
3901-3922 Other Employee Benefits			
3901 - Other Benefits Cert	907,821	939,593	992,318
3902 - Other Benefits Class	175,144	181,275	201,216
3922 - 457b Employer match-Classified	611,522	651,270	722,910
Total 3901-3922 Other Employee Benefits	1,694,487	1,772,138	1,916,444
Total 3100-3999 Employee Benefits	11,642,033	12,466,898	13,586,295



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School

	2025-26 July	2026-27	2027-28
4100-4799 Books, Materials, & Supplies			
4200 Books and Other Reference Materials			
4200 - Other Reference Materials	483,373	540,957	601,726
Total 4200 Books and Other Reference Materials	483,373	540,957	601,726
4300 Materials and Supplies			
4310 - Materials & Supplies	454,661	565,083	630,864
4320 - Office Supplies	124,782	108,889	116,953
4330 - Meals & Events	52,675	59,751	62,205
4350 - Other Supplies - Materials & Supplies	13,366	11,793	13,558
4381 - Instructional Funds - Materials	2,520,567	2,762,869	3,108,300
Total 4300 Materials and Supplies	3,166,051	3,508,385	3,931,880
4400 Noncapitalized Equipment			
4400 - Non-Capitalized Equipment	443,967	431,663	461,115
Total 4400 Noncapitalized Equipment	443,967	431,663	461,115
Total 4100-4799 Books, Materials, & Supplies	4,093,391	4,481,005	4,994,721
5100-5999 Services & Other Operating Expenditures			
5100 Subagreements for Services			
5100 - SpEd Consultants and Vendors Subagreements for Service	141,988	158,419	177,922
Total 5100 Subagreements for Services	141,988	158,419	177,922
5200 Travel and Conferences			
5210 - Mileage Reimbursements	21,542	117,891	120,183
5220 - Travel & Lodging	196,550	206,378	227,686
5225 - Travel & Conferences Meals	99,061	0	0
Total 5200 Travel and Conferences	317,153	324,269	347,869
5300 Dues and Memberships			
5300 - Dues & Memberships	127,867	140,604	150,999
Total 5300 Dues and Memberships	127,867	140,604	150,999
5400 Insurance			
5400 - Insurance	123,434	144,268	146,341
Total 5400 Insurance	123,434	144,268	146,341
5500 Operations and Housekeeping Services			
5510 - Utilities (General)	112,584	112,584	113,149
Total 5500 Operations and Housekeeping Services	112,584	112,584	113,149



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School

	2025-26 July	2026-27	2027-28
5600 Rents, Leases, Repairs, and Noncap. Improvements			
5610 - Facility Rents & Leases	587,842	601,993	615,112
5612 - Testing Site	103,487	65,962	73,928
5620 - Equipment Leases	4,435	4,874	5,343
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	695,764	672,829	694,383
5800 Professional/Consulting Services and Operating Expend.			
5800 - Professional Services - Non-instructional	210,929	179,804	184,781
5810 - Legal	221,709	243,014	268,120
5820 - Audit & CPA	47,466	43,241	43,863
5835 - Field Trips	109,743	130,313	144,029
5840 - Advertising & Recruitment	68,400	62,212	66,376
5850 - Oversight Fees	1,541,914	1,747,318	1,969,502
5860 - Service Fees	358,192	392,628	435,196
5863 - Professional Development	794,209	743,902	762,570
5870 - Livescan Fingerprinting	5,173	2,437	2,472
5877 - Lending Library	848,587	5,503	5,583
5878 - Student Assessment	31,448	39,389	43,464
5880 - Instructional Vendors & Consultants	84,069	0	0
5881 - Instructional Funds - Services	5,881,325	6,446,693	7,252,701
5883 - Outside Consultant and Services	33,020	11,557	12,282
5887 - Student Service Technology	613,756	638,269	697,039
Total 5800 Professional/Consulting Services and Operating Expend.	10,849,940	10,686,280	11,887,978
5900 Communications			
5930 - Postage	112,112	113,685	115,478
5940 - Technology Services	1,484,025	848,653	914,603
Total 5900 Communications	1,596,137	962,338	1,030,081
Total 5100-5999 Services & Other Operating Expenditures	13,964,867	13,201,591	14,548,722



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School

	2025-26 July	2026-27	2027-28
6100-6999 Capital Outlay			
Capital Expenditures			
6901 - Depreciation Expense-Leasehold Improvements	131,028	155,400	157,634
Total Capital Expenditures	131,028	155,400	157,634
Total 6100-6999 Capital Outlay	131,028	155,400	157,634
Total Expenditures	61,801,897	65,472,528	71,442,159
Operating Income/(Loss)	328,262	1,375,079	3,620,010
Net Assets			
9791 - Beginning Fund Balance	18,028,338	18,356,600	19,731,679
Total Net Assets	18,028,338	18,356,600	19,731,679
Change In Net Assets	328,262	1,375,079	3,620,010
Total Net Assets	18,356,600	19,731,679	23,351,689
Net revenue as a % of expense	0.5 %	2.1 %	5.1 %
Fund balance as a % of expense	29.7 %	30.1 %	32.7 %
Days of Potential Cash	108	110	119



	108	106	101	106	105	105	108	115	112	121	122	125	92	0
Days of Potential Cash	108	106	101	106	105	105	108	115	112	121	122	125	92	0

2025-26 JULY vs EA

Cash Flow Statement 2026-27

Sage Oak Charter School

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027
		Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection
Cash Balance													
Beginning Cash	15,546,089	15,546,089	20,060,770	18,330,453	18,173,168	19,090,934	19,463,171	20,293,197	21,061,754	20,655,157	21,037,362	20,537,179	20,036,996
Net Cash for Period													
REVENUES	66,847,607	3,736,781	3,643,195	6,283,675	6,744,924	5,682,047	5,916,013	5,682,047	5,682,047	6,470,848	5,588,460	5,588,460	5,829,111
EXPENDITURES	65,472,528	2,032,611	5,373,512	6,440,960	5,827,157	5,309,810	5,085,987	4,913,490	6,088,643	6,088,643	6,088,643	6,088,643	6,134,428
Net Cash for Period	1,375,079	1,704,171	(1,730,317)	(157,285)	917,766	372,237	830,026	768,557	(406,597)	382,205	(500,183)	(500,183)	(305,317)
Accounts Receivable	(4,793,782)	(4,793,782)											
Accounts Payable	(2,490,066)	(2,490,066)											
Deferred Revenue/Prepaid Expenses	506,795	506,795											
Cash at End of Period	19,731,679	20,060,770	18,330,453	18,173,168	19,090,934	19,463,171	20,293,197	21,061,754	20,655,157	21,037,362	20,537,179	20,036,996	19,731,679
Days of Potential Cash	110	112	102	101	106	109	113	117	115	117	114	112	110

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069 1885 - Sage Oak

Charter Approving Entity: Helendale Elementary SD

County: San Bernardino

Charter #: 1885

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below; check only one box)

☒ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)

☐ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	49,904,896.00		49,904,896.00
Education Protection Account State Aid - Current Year	8012	819,454.00		819,454.00
State Aid - Prior Years	8019	0.00		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	710,854.00		710,854.00
Other LCFF Transfers	8091, 8097	0.00		0.00
Total, LCFF Sources		51,435,204.00	0.00	51,435,204.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		561,184.00	561,184.00
Special Education - Federal	8181, 8182		643,420.00	643,420.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	0.00	0.00
Total, Federal Revenues		0.00	1,204,604.00	1,204,604.00
3. Other State Revenues				
Special Education - State	StateRevSE		3,759,361.00	3,759,361.00
All Other State Revenues	StateRevAO	920,956.00	4,064,504.00	4,985,460.00
Total, Other State Revenues		920,956.00	7,823,865.00	8,744,821.00
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	745,530.00	0.00	745,530.00
Total, Local Revenues		745,530.00	0.00	745,530.00
5. TOTAL REVENUES		53,101,690.00	9,028,469.00	62,130,159.00
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	14,483,240.00	1,997,420.00	16,480,660.00
Certificated Pupil Support Salaries	1200	2,675,036.00	3,243,371.00	5,918,407.00
Certificated Supervisors' and Administrators' Salaries	1300	2,773,749.00	512,941.00	3,286,690.00
Other Certificated Salaries	1900	0.00	0.00	0.00
Total, Certificated Salaries		19,932,025.00	5,753,732.00	25,685,757.00
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	304,718.00	702,381.00	1,007,099.00
Noncertificated Support Salaries	2200	0.00	0.00	0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	2,564,583.00	148,828.00	2,713,411.00
Clerical, Technical and Office Salaries	2400	2,454,486.00	109,825.00	2,564,311.00
Other Noncertificated Salaries	2900	0.00	0.00	0.00
Total, Noncertificated Salaries		5,323,787.00	961,034.00	6,284,821.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069 1885 - Sage Oak

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	3,788,173.00	1,101,578.00	4,889,751.00
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	716,824.00	161,743.00	878,567.00
Health and Welfare Benefits	3401-3402	3,005,725.00	959,719.00	3,965,444.00
Unemployment Insurance	3501-3502	74,262.00	24,687.00	98,949.00
Workers' Compensation Insurance	3601-3602	90,644.00	24,191.00	114,835.00
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	1,354,826.00	339,661.00	1,694,487.00
Total, Employee Benefits		9,030,454.00	2,611,579.00	11,642,033.00
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	0.00	0.00	0.00
Books and Other Reference Materials	4200	456,810.00	26,563.00	483,373.00
Materials and Supplies	4300	2,815,170.00	350,881.00	3,166,051.00
Noncapitalized Equipment	4400	443,967.00	0.00	443,967.00
Food	4700	0.00	0.00	0.00
Total, Books and Supplies		3,715,947.00	377,444.00	4,093,391.00
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	0.00	141,988.00	141,988.00
Travel and Conferences	5200	317,153.00	0.00	317,153.00
Dues and Memberships	5300	127,867.00	0.00	127,867.00
Insurance	5400	123,434.00	0.00	123,434.00
Operations and Housekeeping Services	5500	112,584.00	0.00	112,584.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	593,377.00	102,387.00	695,764.00
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	8,918,364.00	1,931,576.00	10,849,940.00
Communications	5900	1,389,871.00	206,266.00	1,596,137.00
Total, Services and Other Operating Expenditures		11,582,650.00	2,382,217.00	13,964,867.00
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	131,028.00	0.00	131,028.00
Amortization Expense - Lease Assets	6910	0.00	0.00	0.00
Total, Capital Outlay		131,028.00	0.00	131,028.00
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	0.00	0.00	0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		49,715,891.00	12,086,006.00	61,801,897.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069 1885 - Sage Oak

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		3,385,799.00	(3,057,537.00)	328,262.00
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979			0.00
2. Less: Other Uses	7630-7699			0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(3,057,537.00)	3,057,537.00	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(3,057,537.00)	3,057,537.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		328,262.00	0.00	328,262.00
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	18,028,338.00	0.00	18,028,338.00
b. Adjustments/Restatements	9793, 9795	0.00		0.00
c. Adjusted Beginning Fund Balance /Net Position		18,028,338.00	0.00	18,028,338.00
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		18,356,600.00	0.00	18,356,600.00
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	0.00	0.00	0.00
b. Restricted Net Position	9797		0.00	0.00
c. Unrestricted Net Position	9790A	18,356,600.00	0.00	18,356,600.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069 1885 - Sage Oak

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110	0.00	0.00	0.00
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00
In Banks	9120	15,689,103.00	2,667,497.00	18,356,600.00
In Revolving Fund	9130	0.00	0.00	0.00
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00
Collections Awaiting Deposit	9140	0.00	0.00	0.00
2. Investments	9150	0.00	0.00	0.00
3. Accounts Receivable	9200	4,515,659.00	2,358,504.00	6,874,163.00
4. Due from Grantor Governments	9290	0.00	0.00	0.00
5. Stores	9320	0.00	0.00	0.00
6. Prepaid Expenditures (Expenses)	9330	147,782.00	25,126.00	172,908.00
7. Other Current Assets	9340	0.00	0.00	0.00
8. Lease Receivable	9380	0.00	0.00	0.00
9. Capital Assets (accrual basis only)	9400-9489	359,485.00	0.00	359,485.00
10. TOTAL ASSETS		20,712,029.00	5,051,127.00	25,763,156.00
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	1,925,120.00	1,078,379.00	3,003,499.00
2. Due to Grantor Governments	9590	0.00	0.00	0.00
3. Current Loans	9640	0.00	0.00	0.00
4. Unearned Revenue	9650	0.00	3,972,748.00	3,972,748.00
5. Long-Term Liabilities (accrual basis only)	9660-9669	430,309.00	0.00	430,309.00
6. TOTAL LIABILITIES		2,355,429.00	5,051,127.00	7,406,556.00
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690	0.00	0.00	0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		18,356,600.00	0.00	18,356,600.00

**CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026**

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069 1885 - Sage Oak

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. None	\$ 0.00	0.00	0.00
b.			0.00
c.			0.00
d.			0.00
e.			0.00
f.			0.00
g.			0.00
h.			0.00
i.			0.00
j.			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries 1000-1999	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits except 3801-	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Brief Description i.e., COVID-19 (If no amounts, indicate "None")	Amount
a. None	0.00
b.	
c.	
d.	
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)	0.00

**CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026**

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069 1885 - Sage Oak

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2024-25 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2025-26.

a. Total Expenditures (B8)	61,801,897.00
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	1,204,604.00
c. Subtotal of State & Local Expenditures [a minus b]	60,597,293.00
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	131,028.00
f. Less Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster	0.00
TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e minus f]	\$ 60,466,265.00



Sage Oak Charter School - Keppel 2025-26 July Budget



Summary Analysis

Sage Oak Charter School - Keppel

Summary of Results

The 2025-26 July Budget projects a net revenue of \$0.03M. Net revenue changed by \$0.01M from the 2024-25 Estimated Actuals (EA) of \$0.02M. Positive net revenue and a strong reserve balance will allow Sage Oak Charter Schools to end the 2025-26 fiscal year with a reserve of \$2.80M, which is 40.6% of annual expenditures.

Cash Flow

In the budgeted year's cash flow analysis, it was observed that the cash is projected to reach its lowest point at the end of June 2026, with \$2.49M cash on hand. The cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Changes to Revenue

The 10.4% change in revenue from the 2024-25 EA to the 2025-26 July Budget is due to LCFF, federal, and state revenues. Student average daily attendance (ADA) changed from 440 during the 2024-25 EA Budget to 462 in the 2025-26 July Budget.

Changes to Expenditures

Sage Oak-Keppel has an overall change of 10.2% in expenditures from the 2024-EA to the 2025-26 July Budget. The change can be attributed to staffing, services, and materials for students, aligned with student enrollment.



Enrollment and ADA Assumptions

Sage Oak Charter School - Keppel

		Unduplicated Pupil Percentage (UPP)		
2025-26		Enrollment	ADA	
	TK-3	219	218	
	4-6	110	109	
	7-8	73	73	
	9-12	63	63	
	Total	465	462	219
	Growth	3.8%	99.4%	47.1%
2026-27		Enrollment	ADA	UPP
	TK-3	240	238	
	4-6	121	120	
	7-8	80	79	
	9-12	69	68	
	Total	510	506	239
	Growth	9.7%	99.2%	46.9%
2027-28		Enrollment	ADA	UPP
	TK-3	261	259	
	4-6	132	131	
	7-8	87	86	
	9-12	75	74	
	Total	555	551	260
	Growth	8.9%	99.2%	46.9%



2025-26 JULY vs EA - Summary

Sage Oak Charter School - Keppel

	2025-26 July	2024-25 EA	\$ Change	% Change
Revenue				
Total LCFF Revenues	5,804,395	5,320,848	483,547	9.1 %
Total Federal Revenue	147,494	145,160	2,334	1.6 %
Total Other State Revenue	961,598	796,014	165,584	20.8 %
Total Revenue	6,913,487	6,262,022	651,465	10.4 %
Expenditures				
Total 1000-1999 Certificated Salaries	2,847,926	2,427,205	420,721	17.3 %
Total 2000-2999 Classified Salaries	731,386	544,713	186,673	34.3 %
Total 3100-3999 Employee Benefits	1,339,244	1,004,370	334,874	33.3 %
Total 4100-4799 Books, Materials, & Supplies	478,551	957,086	(478,535)	(50.0) %
Total 5100-5999 Services & Other Operating Expenditures	1,467,214	1,293,066	174,148	13.5 %
Total 6100-6999 Capital Outlay	15,333	17,201	(1,868)	(10.9) %
Total Expenditures	6,879,654	6,243,641	636,013	10.2 %
Operating Income/(Loss)	33,833	18,381	15,452	84.1 %
Net Assets				
9791 - Beginning Fund Balance	2,762,398	2,628,310	134,088	5.1 %
9793 - Audit Adjustments	0	115,707	(115,707)	(100.0) %
Total Net Assets	2,762,398	2,744,017	18,381	0.7 %
Change In Net Assets	33,833	18,381	15,452	84.1 %
Total Net Assets	2,796,231	2,762,398	33,833	1.2 %
Net revenue as a % of expense	0.5 %	0.3 %		
Fund balance as a % of expense	40.6 %	44.2 %		
Days of Potential Cash	148	161		



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	4,897,194	4,501,626	395,568	8.8 %	
8012 - EPA Entitlement	92,442	87,912	4,530	5.2 %	
8096 - In-Lieu-Of Property Taxes	814,759	731,310	83,449	11.4 %	
Total LCFF Revenues	5,804,395	5,320,848	483,547	9.1 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	68,280	61,353	6,927	11.3 %	
8182 - SpEd - Discretionary Grants	5,441	5,441	0	0.0 %	
8290 - Other Federal Revenue	73,773	78,366	(4,593)	(5.9) %	
Total Federal Revenue	147,494	145,160	2,334	1.6 %	The change is due to enrollment and ADA.
Other State Revenue					
8311 - AB602 State SpEd Revenue	424,091	399,540	24,551	6.1 %	
8550 - Mandated Cost Reimbursements	11,054	9,386	1,668	17.8 %	
8560 - Lottery- Unrestricted	92,207	56,258	35,949	63.9 %	
8561 - Lottery- Prop 20 - Restricted	39,586	37,646	1,940	5.2 %	
8590 - Other State Revenue	394,660	293,184	101,476	34.6 %	
Total Other State Revenue	961,598	796,014	165,584	20.8 %	The change is due to the Arts, Music, and Instructional Materials (AMIM) grant being recognized.
Total Revenue	6,913,487	6,262,022	651,465	10.4 %	
Expenditures					
1000-1999 Certificated Salaries					
1001 Cert. Off Schedule Pay	0	137,742	(137,742)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
1100 Certificated Teachers Salaries	1,770,759	1,526,291	244,468	16.0 %	
1200 Certificated Pupil Support	692,563	528,571	163,992	31.0 %	
1300 Certificated Supervisors and Administrators Salaries	384,604	234,601	150,003	63.9 %	
Total 1000-1999 Certificated Salaries	2,847,926	2,427,205	420,721	17.3 %	The change is related to staffing needs aligned with student enrollment and the cost-of-living adjustment (COLA) in 2025-26.
2000-2999 Classified Salaries					
2001 Class. Off Schedule Pay	0	31,459	(31,459)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
2100 Classified Instructional Salaries	113,795	74,980	38,815	51.8 %	
2300 Classified Supervisors and Admin Salaries	317,519	226,388	91,131	40.3 %	
2400 Clerical, Technical and Office Salaries	300,072	211,886	88,186	41.6 %	
Total 2000-2999 Classified Salaries	731,386	544,713	186,673	34.3 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3000-3999 Employee Benefits					
3001-3002 Employee Off Schedule Benefit					
3001 - Certificated Off Schedule Pay Benefits	0	2,364	(2,364)	(100.0) %	
3002 - Classified Off Schedule Pay Benefits	0	2,517	(2,517)	(100.0) %	
Total 3001-3002 Employee Off Schedule Benefit	0	4,881	(4,881)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
3101-3102 STRS					
3101 - STRS Certificated	542,047	417,826	124,221	29.7 %	
Total 3101-3102 STRS	542,047	417,826	124,221	29.7 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	42,487	32,655	9,832	30.1 %	
3314 - Medicare - Classified	10,801	7,330	3,471	47.4 %	
3355 - OASDI - Certificated	675	997	(322)	(32.3) %	
3356 - OASDI - Classified	46,180	31,347	14,833	47.3 %	
Total 3301-3302 OASDI/Medicare/Alternative	100,143	72,329	27,814	38.5 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	356,512	303,110	53,402	17.6 %	
3402 - Health Care Classified	124,016	73,315	50,701	69.2 %	
Total 3401-3402 Health and Welfare Benefits	480,528	376,425	104,103	27.7 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	7,627	7,945	(318)	(4.0) %	
3502 - Unemployment Insurance Classified	3,501	3,142	359	11.4 %	
Total 3501-3502 Unemployment Insurance	11,128	11,087	41	0.4 %	
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	10,250	7,884	2,366	30.0 %	
3602 - Workers' Comp Classified	2,608	1,761	847	48.1 %	
Total 3601-3602 Workers' Compensation	12,858	9,645	3,213	33.3 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3901-3922 Other Employee Benefits					
3901 - Other Benefits Cert	101,026	72,620	28,406	39.1 %	
3902 - Other Benefits Class	20,324	10,389	9,935	95.6 %	
3921 - 457b Employer match-Certification	0	0	0	0.0 %	
3922 - 457b Employer match-Classified	71,190	29,168	42,022	144.1 %	
Total 3901-3922 Other Employee Benefits	192,540	112,177	80,363	71.6 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
Total 3000-3999 Employee Benefits	1,339,244	1,004,370	334,874	33.3 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	56,112	290,797	(234,685)	(80.7) %	
Total 4200 Books and Other Reference Materials	56,112	290,797	(234,685)	(80.7) %	The change is due to the purchase of additional curriculum for Oak School students, which was completed in the 2024-25 fiscal year.
4300 Materials and Supplies					
4310 - Materials & Supplies	53,204	40,371	12,833	31.8 %	The change is due to additional materials and supplies aligned with student enrollment.
4320 - Office Supplies	14,602	21,629	(7,027)	(32.5) %	The change is due to a one-time purchase of supplies for the Career and Technical Education (CTE) pathway program.
4330 - Events	6,164	1,359	4,805	353.6 %	The change is due to object code alignment for student-related art activities and events.
4350 - Other Supplies - Materials & Supplies	1,564	1,210	354	29.3 %	The change is due to materials and supplies needed for student graduation.
4381 - Instructional Funds - Materials	294,953	467,945	(172,992)	(37.0) %	The change is due to a shift in instructional funds from materials to services.
Total 4300 Materials and Supplies	370,487	532,514	(162,027)	(30.4) %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	51,952	133,775	(81,823)	(61.2) %	The change is due to one-time purchases of new devices for staff and students.
Total 4400 Noncapitalized Equipment	51,952	133,775	(81,823)	(61.2) %	
Total 4100-4799 Books, Materials, & Supplies	478,551	957,086	(478,535)	(50.0) %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	16,616	41,797	(25,181)	(60.2) %	
Total 5100 Subagreements for Services	16,616	41,797	(25,181)	(60.2) %	The change is due to employee recruitment rather than utilizing external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	2,521	330	2,191	663.9 %	The change is due to coding alignment for employee reimbursements.
5220 - Travel & Lodging	23,000	30,989	(7,989)	(25.8) %	The change is due to staff attendance at professional development conferences.
5225 - Travel & Conferences	11,592	13,080	(1,488)	(11.4) %	The change is due to additional administrative planning sessions.
Total 5200 Travel and Conferences	37,113	44,399	(7,286)	(16.4) %	
5300 Dues and Memberships					
5300 - Dues & Memberships	14,962	16,178	(1,216)	(7.5) %	
Total 5300 Dues and Memberships	14,962	16,178	(1,216)	(7.5) %	The change is due to updated allocation percentages per location.
5400 Insurance					
5400 - Insurance	14,444	20,236	(5,792)	(28.6) %	
Total 5400 Insurance	14,444	20,236	(5,792)	(28.6) %	The change is due to a cyber liability insurance policy.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	13,175	5,463	7,712	141.2 %	
Total 5500 Operations and Housekeeping Services	13,175	5,463	7,712	141.2 %	The change is due to coding alignment for student Wi-Fi services.
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	68,788	51,557	17,231	33.4 %	The change is due to the lease of additional office and warehouse space.
5612 - Testing Site	12,110	7,840	4,270	54.5 %	The change is due to rental of assessment locations for Special Education students.
5620 - Equipment Leases	519	561	(42)	(7.5) %	The change is due to updated allocation percentages per location.
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	81,417	59,958	21,459	35.8 %	
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	24,369	15,776	8,593	54.5 %	The change is due to adjustments in marketing consultant services related to data systems.
5810 - Legal	25,944	28,050	(2,106)	(7.5) %	The change is due to updated allocation percentages per location.
5820 - Audit & CPA	5,555	6,106	(551)	(9.0) %	The change is due to updated allocation percentages per location.
5835 - Field Trips	12,423	9,492	2,931	30.9 %	The change is due to additional student field trips.
5840 - Advertising & Recruitment	8,004	12,747	(4,743)	(37.2) %	The change is due to advertising expenses for marketing efforts and recruitment.
5850 - Oversight Fees	58,047	52,515	5,532	10.5 %	The change is due to additional enrollment, which increases revenue and thereby oversight fees.
5860 - Service Fees	41,915	50,073	(8,158)	(16.3) %	The change is due to updated allocation percentages per location.
5863 - Professional Development	79,029	24,984	54,045	216.3 %	The change is due to utilization of the AMIM Grant for teachers and staff professional development
5870 - Livescan Fingerprinting	605	146	459	314.4 %	The change is due to the purchase and associated maintenance fee for the Live Scan printer.
5877 - Lending Library	77,719	1,287	76,432	5,938.8 %	The change is due to additional curriculum purchases for the Lending Library.
5878 - Student Assessment	3,680	3,710	(30)	(0.8) %	
5880 - Instructional Vendors & Consultants	7,746	8,800	(1,054)	(12.0) %	The change is due to offering college and career transition training for staff to better support students.
5881 - Instructional Funds - Services	688,225	701,917	(13,692)	(2.0) %	The change is due to a shift in instructional funds from materials to services.
5883 - Outside Consultant and Services	3,864	10,560	(6,696)	(63.4) %	The change is due to contracting an outside consultant for job descriptions update.
5887 - Student Service Technology	70,864	83,301	(12,437)	(14.9) %	The change is due to updated allocation percentages per location.
Total 5800 Professional/Consulting Services and Operating Expend.	1,107,989	1,009,464	98,525	9.8 %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5900 Communications					
5930 - Postage	13,119	11,921	1,198	10.0 %	The change is due to warehouse shipping expenses.
5940 - Technology Services	168,379	83,650	84,729	101.3 %	The change is due to the number of staff and student users accessing technology applications.
Total 5900 Communications	181,498	95,571	85,927	89.9 %	
Total 5100-5999 Services & Other Operating Expenditures	1,467,214	1,293,066	174,148	13.5 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	15,333	17,201	(1,868)	(10.9) %	The change is due to the depreciation of new capitalized equipment and leases.
Total Capital Expenditures	15,333	17,201	(1,868)	(10.9) %	
Total 6100-6999 Capital Outlay	15,333	17,201	(1,868)	(10.9) %	
Total Expenditures	6,879,654	6,243,641	636,013	10.2 %	
Operating Income/(Loss)	33,833	18,381	15,452	84.1 %	
Net Assets					
9791 - Beginning Fund Balance	2,762,398	2,628,310	134,088	5.1 %	
9793 - Audit Adjustments	0	115,707	(115,707)	(100.0) %	
Total Net Assets	2,762,398	2,744,017	18,381	0.7 %	
Change In Net Assets	33,833	18,381	15,452	84.1 %	
Total Net Assets	2,796,231	2,762,398	33,833	1.2 %	
Net revenue as a % of expense	0.5 %	0.3 %			
Fund balance as a % of expense	40.6 %	44.2 %			
Days of Potential Cash	148	161			



2025-26 JULY vs EA - MYP Summary

Sage Oak Charter School - Keppel

Enrollment	465	510	555
ADA	462	506	551
COLA	2.30 %	3.52 %	3.63 %

	2025-26 July	2026-27	2027-28
Revenue			
Total LCFF Revenues	5,804,395	6,584,871	7,423,971
Total Federal Revenue	147,494	153,841	160,965
Total Other State Revenue	961,598	746,868	831,374
Total Revenue	6,913,487	7,485,580	8,416,310
Expenditures			
Total 1000-1999 Certificated Salaries	2,847,926	3,093,716	4,007,837
Total 2000-2999 Classified Salaries	731,386	804,524	893,022
Total 3100-3999 Employee Benefits	1,339,244	1,431,151	1,558,484
Total 4100-4799 Books, Materials, & Supplies	478,551	524,361	455,672
Total 5100-5999 Services & Other Operating Expenditures	1,467,214	1,406,208	1,228,805
Total 6100-6999 Capital Outlay	15,333	18,185	15,319
Total Expenditures	6,879,654	7,278,145	8,159,139
Operating Income/(Loss)	33,833	207,435	257,171
Net Assets			
9791 - Beginning Fund Balance	2,762,398	2,796,231	3,003,666
Total Net Assets	2,762,398	2,796,231	3,003,666
Change In Net Assets	33,833	207,435	257,171
Total Net Assets	2,796,231	3,003,666	3,260,837
Net revenue as a % of expense	0.5 %	2.9 %	3.2 %
Fund balance as a % of expense	40.6 %	41.3 %	40.0 %
Days of Potential Cash	148	151	146



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2025-26 July	2026-27	2027-28
Revenue			
LCFF Revenue			
8011 - LCFF General Entitlement	4,897,194	5,563,105	6,312,543
8012 - EPA Entitlement	92,442	101,184	110,111
8096 - In-Lieu-Of Property Taxes	814,759	920,582	1,001,317
Total LCFF Revenues	5,804,395	6,584,871	7,423,971
Federal Revenue			
8181 - Federal IDEA SpEd Revenue	68,281	75,327	82,451
8182 - SpEd - Discretionary Grants	5,440	5,441	5,441
8290 - Other Federal Revenue	73,773	73,073	73,073
Total Federal Revenue	147,494	153,841	160,965
Other State Revenue			
8311 - AB602 State SpEd Revenue	424,091	480,536	541,919
8550 - Mandated Cost Reimbursements	11,054	12,209	13,837
8560 - Lottery- Unrestricted	92,207	100,927	109,832
8561 - Lottery- Prop 20 - Restricted	39,586	43,330	47,153
8590 - Other State Revenue	394,660	109,866	118,633
Total Other State Revenue	961,598	746,868	831,374
Total Revenue	6,913,487	7,485,580	8,416,310
Expenditures			
1000-1999 Certificated Salaries			
1100 Certificated Teachers Salaries	1,770,759	1,947,833	2,692,616
1200 Certificated Pupil Support	692,563	761,820	845,620
1300 Certificated Supervisors and Administrators Salaries	384,604	423,064	469,601
Total 1000-1999 Certificated Salaries	2,847,926	3,132,717	4,007,837
2000-2999 Classified Salaries			
2100 Classified Instructional Salaries	113,795	125,174	138,943
2300 Classified Supervisors and Admin Salaries	317,520	349,271	387,691
2400 Clerical, Technical and Office Salaries	300,072	330,079	366,388
Total 2000-2999 Classified Salaries	731,387	804,524	893,022



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2025-26 July	2026-27	2027-28
3100-3999 Employee Benefits			
3101-3102 STRS			
3101 - STRS Certificated	542,047	598,349	660,448
Total 3101-3102 STRS	542,047	598,349	660,448
3301-3302 OASDI/Medicare/Alternative			
3313 - Medicare - Certificated	42,487	46,633	51,416
3314 - Medicare - Classified	10,801	11,867	13,172
3355 - OASDI - Certificated	675	719	798
3356 - OASDI - Classified	46,180	49,181	54,591
Total 3301-3302 OASDI/Medicare/Alternative	100,143	108,400	119,977
3401-3402 Health and Welfare Benefits			
3401 - Health Care Certificated	356,512	368,989	389,558
3402 - Health Care Classified	124,016	128,357	142,477
Total 3401-3402 Health and Welfare Benefits	480,528	497,346	532,035
3501-3502 Unemployment Insurance			
3501 - Unemployment Insurance Certificated	7,627	7,895	8,360
3502 - Unemployment Insurance Classified	3,501	3,625	4,023
Total 3501-3502 Unemployment Insurance	11,128	11,520	12,383
3601-3602 Workers' Compensation			
3601 - Workers' Comp Certificated	10,250	11,257	12,412
3602 - Workers' Comp Classified	2,608	2,865	3,181
Total 3601-3602 Workers' Compensation	12,858	14,122	15,593
3901-3922 Other Employee Benefits			
3901 - Other Benefits Cert	101,026	104,562	110,543
3902 - Other Benefits Class	20,324	21,034	23,348
3922 - 457b Employer match-Classified	71,190	75,818	84,157
Total 3901-3922 Other Employee Benefits	192,540	201,414	218,048
Total 3100-3999 Employee Benefits	1,339,244	1,431,151	1,558,484



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2025-26 July	2026-27	2027-28
4100-4799 Books, Materials, & Supplies			
4200 Books and Other Reference Materials			
4200 - Other Reference Materials	56,112	63,302	58,475
Total 4200 Books and Other Reference Materials	56,112	63,302	58,475
4300 Materials and Supplies			
4310 - Materials & Supplies	53,204	66,125	61,307
4320 - Office Supplies	14,602	12,742	11,365
4330 - Meals & Events	6,164	6,992	6,045
4350 - Other Supplies - Materials & Supplies	1,564	1,380	1,318
4381 - Instructional Funds - Materials	294,953	323,307	272,351
Total 4300 Materials and Supplies	370,487	410,546	352,386
4400 Noncapitalized Equipment			
4400 - Non-Capitalized Equipment	51,952	50,513	44,811
Total 4400 Noncapitalized Equipment	51,952	50,513	44,811
Total 4100-4799 Books, Materials, & Supplies	478,551	524,361	455,672
5100-5999 Services & Other Operating Expenditures			
5100 Subagreements for Services			
5100 - SpEd Consultants and Vendors Subagreements for Service	16,616	18,538	17,290
Total 5100 Subagreements for Services	16,616	18,538	17,290
5200 Travel and Conferences			
5210 - Mileage Reimbursements	2,521	2,226	1,891
5220 - Travel & Lodging	23,000	24,150	22,126
5225 - Travel & Conferences Meals	11,592	11,569	9,788
Total 5200 Travel and Conferences	37,113	37,945	33,805
5300 Dues and Memberships			
5300 - Dues & Memberships	14,962	16,453	14,674
Total 5300 Dues and Memberships	14,962	16,453	14,674
5400 Insurance			
5400 - Insurance	14,444	16,882	14,221
Total 5400 Insurance	14,444	16,882	14,221
5500 Operations and Housekeeping Services			
5510 - Utilities (General)	13,175	13,174	12,449
Total 5500 Operations and Housekeeping Services	13,175	13,174	12,449



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2025-26 July	2026-27	2027-28
5600 Rents, Leases, Repairs, and Noncap. Improvements			
5610 - Facility Rents & Leases	68,788	70,444	59,776
5612 - Testing Site	12,110	7,719	7,184
5620 - Equipment Leases	519	570	519
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	81,417	78,733	67,479
5800 Professional/Consulting Services and Operating Expend.			
5800 - Professional Services - Non-instructional	24,369	21,040	17,957
5810 - Legal	25,944	28,437	26,056
5820 - Audit & CPA	5,555	5,060	4,263
5835 - Field Trips	12,423	15,249	13,997
5840 - Advertising & Recruitment	8,004	7,280	6,450
5850 - Oversight Fees	58,047	65,849	74,240
5860 - Service Fees	41,915	45,945	42,292
5863 - Professional Development	79,029	87,050	74,106
5870 - Livescan Fingerprinting	605	285	240
5877 - Lending Library	77,719	644	543
5878 - Student Assessment	3,680	4,609	4,224
5880 - Instructional Vendors & Consultants	7,746	0	0
5881 - Instructional Funds - Services	688,225	754,383	635,486
5883 - Outside Consultant and Services	3,864	1,352	1,194
5887 - Student Service Technology	70,864	74,689	67,737
Total 5800 Professional/Consulting Services and Operating Expend.	1,107,989	1,111,872	968,785
5900 Communications			
5930 - Postage	13,119	13,303	11,222
5940 - Technology Services	168,379	99,308	88,880
Total 5900 Communications	181,498	112,611	100,102
Total 5100-5999 Services & Other Operating Expenditures	1,467,214	1,406,208	1,228,805



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2025-26 July	2026-27	2027-28
6100-6999 Capital Outlay			
Capital Expenditures			
6901 - Depreciation Expense-Leasehold Improvements	15,333	18,185	15,319
Total Capital Expenditures	15,333	18,185	15,319
Total 6100-6999 Capital Outlay	15,333	18,185	15,319
Total Expenditures	6,879,655	7,317,146	8,159,139
Operating Income/(Loss)	33,832	168,434	257,171
Net Assets			
9791 - Beginning Fund Balance	2,762,398	2,796,230	2,964,664
Total Net Assets	2,762,398	2,796,230	2,964,664
Change In Net Assets	33,832	168,434	257,171
Total Net Assets	2,796,230	2,964,664	3,221,835
Net revenue as a % of expense	0.5 %	2.3 %	3.2 %
Fund balance as a % of expense	40.6 %	40.5 %	39.5 %
Days of Potential Cash	148	148	144



2025-26 JULY vs EA

Cash Flow Statement 2025-26

Sage Oak Charter School - Keppel

	Year Ending 06/30/2026	Month Ending 07/31/2025	Month Ending 08/31/2025	Month Ending 09/30/2025	Month Ending 10/31/2025	Month Ending 11/30/2025	Month Ending 12/31/2025	Month Ending 01/31/2026	Month Ending 02/28/2026	Month Ending 03/31/2026	Month Ending 04/30/2026	Month Ending 05/31/2026	Month Ending 06/30/2026	Accrued
Cash Balance														
Beginning Cash	2,762,398	2,762,398	2,865,198	2,742,521	2,869,318	2,856,239	2,840,325	2,889,702	2,978,213	2,972,871	3,113,808	3,117,097	3,126,623	
Net Cash for Period														
REVENUES	6,913,487	339,323	335,479	656,616	547,328	550,464	611,915	630,440	551,753	717,645	573,645	612,577	756,222	30,080
EXPENDITURES	6,879,654	235,522	458,155	529,819	560,407	566,378	562,538	541,930	557,095	576,708	570,356	603,051	953,986	163,709
Net Cash for Period	33,833	103,801	(122,676)	126,797	(13,079)	(15,914)	49,377	88,510	(5,342)	140,937	3,289	9,526	(197,764)	(133,629)
Accounts Receivable	1,232,965	1,232,965											440,751	(440,751)
Accounts Payable	801,141	801,141												
Debt Proceeds														
Deferred Revenue/Prepaid Expenses	431,823	430,823												1,000
Cash at End of Period	2,796,230	2,865,198	2,742,521	2,869,318	2,856,239	2,840,325	2,889,702	2,978,213	2,972,871	3,113,808	3,117,097	3,126,623	2,488,108	
Days of Potential Cash	148	152	146	152	152	151	153	158	158	165	165	166	132	0

2025-26 JULY vs EA

Cash Flow Statement 2026-27

Sage Oak Charter School - Keppel

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027	Accrued
Cash Balance														
Beginning Cash	2,488,108	2,488,108	3,122,351	2,932,977	2,920,623	3,028,152	3,074,170	3,171,268	3,261,343	3,220,783	3,268,553	3,217,514	3,166,474	3,137,294
Net Cash for Period														
REVENUES	7,485,580	418,444	407,964	703,645	755,295	636,274	662,474	636,274	636,274	724,604	625,794	625,794	652,743	
EXPENDITURES	7,278,145	225,952	597,338	715,999	647,766	590,256	565,375	546,200	676,834	676,834	676,834	676,834	681,924	
Net Cash for Period	207,435	192,492	(189,373)	(12,354)	107,529	46,018	97,098	90,074	(40,560)	47,770	(51,039)	(51,039)	(29,181)	
Accounts Receivable														
Accounts Payable														
Deferred Revenue/Prepaid Expenses														
Cash at End of Period	1,000	1,000	3,122,351	2,932,977	2,920,623	3,028,152	3,074,170	3,171,268	3,261,343	3,220,783	3,268,553	3,217,514	3,166,474	3,137,294
Days of Potential Cash	157	157	147	146	152	154	159	164	162	164	161	159	157	

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - Keppel
CDS #: 19646420136127 1886 - Keppel
Charter Approving Entity: Keppel SD
County: Los Angeles
Charter #: 1886

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below; check only one box)

- ☒ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)
☐ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	4,897,194.00		4,897,194.00
Education Protection Account State Aid - Current Year	8012	92,442.00		92,442.00
State Aid - Prior Years	8019	0.00		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	814,759.00		814,759.00
Other LCFF Transfers	8091, 8097	0.00		0.00
Total, LCFF Sources		5,804,395.00	0.00	5,804,395.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		73,773.00	73,773.00
Special Education - Federal	8181, 8182		73,721.00	73,721.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	0.00	0.00
Total, Federal Revenues		0.00	147,494.00	147,494.00
3. Other State Revenues				
Special Education - State	StateRevSE		424,091.00	424,091.00
All Other State Revenues	StateRevAO	103,261.00	434,246.00	537,507.00
Total, Other State Revenues		103,261.00	858,337.00	961,598.00
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	0.00	0.00	0.00
Total, Local Revenues		0.00	0.00	0.00
5. TOTAL REVENUES		5,907,656.00	1,005,831.00	6,913,487.00
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	1,573,331.00	197,428.00	1,770,759.00
Certificated Pupil Support Salaries	1200	313,029.00	379,534.00	692,563.00
Certificated Supervisors' and Administrators' Salaries	1300	324,580.00	60,024.00	384,604.00
Other Certificated Salaries	1900	0.00	0.00	0.00
Total, Certificated Salaries		2,210,940.00	636,986.00	2,847,926.00
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	35,658.00	78,137.00	113,795.00
Noncertificated Support Salaries	2200	0.00	0.00	0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	300,104.00	17,415.00	317,519.00
Clerical, Technical and Office Salaries	2400	287,220.00	12,852.00	300,072.00
Other Noncertificated Salaries	2900	0.00	0.00	0.00
Total, Noncertificated Salaries		622,982.00	108,404.00	731,386.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127 1886 - Keppel

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	420,077.00	121,970.00	542,047.00
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	82,081.00	18,062.00	100,143.00
Health and Welfare Benefits	3401-3402	374,815.00	105,713.00	480,528.00
Unemployment Insurance	3501-3502	8,419.00	2,709.00	11,128.00
Workers' Compensation Insurance	3601-3602	10,173.00	2,685.00	12,858.00
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	154,909.00	37,631.00	192,540.00
Total, Employee Benefits		1,050,474.00	288,770.00	1,339,244.00
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	0.00	0.00	0.00
Books and Other Reference Materials	4200	53,455.00	2,657.00	56,112.00
Materials and Supplies	4300	329,427.00	41,060.00	370,487.00
Noncapitalized Equipment	4400	51,953.00	0.00	51,953.00
Food	4700	0.00	0.00	0.00
Total, Books and Supplies		434,835.00	43,717.00	478,552.00
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	0.00	16,615.00	16,615.00
Travel and Conferences	5200	37,113.00	0.00	37,113.00
Dues and Memberships	5300	14,963.00	0.00	14,963.00
Insurance	5400	14,444.00	0.00	14,444.00
Operations and Housekeeping Services	5500	13,174.00	0.00	13,174.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	69,436.00	11,981.00	81,417.00
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	921,229.00	186,760.00	1,107,989.00
Communications	5900	162,641.00	18,857.00	181,498.00
Total, Services and Other Operating Expenditures		1,233,000.00	234,213.00	1,467,213.00
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	15,332.00	0.00	15,332.00
Amortization Expense - Lease Assets	6910	0.00	0.00	0.00
Total, Capital Outlay		15,332.00	0.00	15,332.00
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	0.00	0.00	0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		5,567,563.00	1,312,090.00	6,879,653.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127 1886 - Keppel

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		340,093.00	(306,259.00)	33,834.00
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00
2. Less: Other Uses	7630-7699	0.00	0.00	0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(306,259.00)	306,259.00	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(306,259.00)	306,259.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		33,834.00	0.00	33,834.00
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	2,762,398.00	0.00	2,762,398.00
b. Adjustments/Restatements	9793, 9795	0.00	0.00	0.00
c. Adjusted Beginning Fund Balance /Net Position		2,762,398.00	0.00	2,762,398.00
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		2,796,232.00	0.00	2,796,232.00
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	0.00	0.00	0.00
b. Restricted Net Position	9797		0.00	0.00
c. Unrestricted Net Position	9790A	2,796,232.00	0.00	2,796,232.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127 1886 - Keppel

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110	0.00	0.00	0.00
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00
In Banks	9120	2,389,411.00	406,819.00	2,796,230.00
In Revolving Fund	9130	0.00	0.00	0.00
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00
Collections Awaiting Deposit	9140	0.00	0.00	0.00
2. Investments	9150	0.00	0.00	0.00
3. Accounts Receivable	9200	736,456.00	389,819.00	1,126,275.00
4. Due from Grantor Governments	9290	0.00	0.00	0.00
5. Stores	9320	0.00	0.00	0.00
6. Prepaid Expenditures (Expenses)	9330	25,757.00	4,385.00	30,142.00
7. Other Current Assets	9340	0.00	0.00	0.00
8. Lease Receivable	9380	0.00	0.00	0.00
9. Capital Assets (accrual basis only)	9400-9489	76,548.00	0.00	76,548.00
10. TOTAL ASSETS		3,228,172.00	801,023.00	4,029,195.00
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	319,865.00	369,200.00	689,065.00
2. Due to Grantor Governments	9590	66,021.00	0.00	66,021.00
3. Current Loans	9640	0.00	0.00	0.00
4. Unearned Revenue	9650		431,823.00	431,823.00
5. Long-Term Liabilities (accrual basis only)	9660-9669	46,056.00	0.00	46,056.00
6. TOTAL LIABILITIES		431,942.00	801,023.00	1,232,965.00
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		2,796,230.00	0.00	2,796,230.00

**CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026**

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127 1886 - Keppel

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. None	\$ 0.00	0.00	0.00
b.			0.00
c.			0.00
d.			0.00
e.			0.00
f.			0.00
g.			0.00
h.			0.00
i.			0.00
j.			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries 1000-1999	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits except 3801-	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Brief Description i.e., COVID-19 (If no amounts, indicate "None")	Amount
a. None	0.00
b.	
c.	
d.	
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)	0.00

**CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026**

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127 1886 - Keppel

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2024-25 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2025-26.

a. Total Expenditures (B8)	6,879,653.00
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	147,494.00
c. Subtotal of State & Local Expenditures [a minus b]	6,732,159.00
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	15,332.00
f. Less Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster	0.00
TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e minus f]	\$ 6,716,827.00



Sage Oak Charter School - South 2025-26 July Budget



Summary Analysis

Sage Oak Charter School - South

Summary of Results

The 2025-26 July Budget projects a net revenue of \$0.06M. Net revenue changed by \$0.05M from the 2024-25 Estimated Actuals (EA) of \$0.01M. Positive net revenue and a strong reserve balance will allow Sage Oak Charter Schools to end the 2025-26 fiscal year with a reserve of \$3.99M, which is 43.7% of annual expenditures.

Cash Flow

In the budgeted year's cash flow analysis, it was observed that the cash is projected to reach its lowest point at the end of June 2026, with \$3.49M cash on hand. The cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Changes to Revenue

The 13.3% change in revenue from the 2024-25 EA to the 2025-26 July Budget is mainly due to LCFF, federal, and state revenues. Student average daily attendance (ADA) changed from 573 during the 2024-25 EA Budget to 609 in the 2025-26 July Budget.

Changes to Expenditures

Sage Oak-South has an overall change of 12.7% in expenditures from the 2024-25 EA to the 2025-26 July Budget. The change can be attributed to staffing, services, and materials for students, aligned with student enrollment.



Enrollment and ADA Assumptions

Sage Oak Charter School - South

2025-26	Enrollment	ADA	Unduplicated Pupil Percentage (UPP)
TK-3	324	322	
4-6	124	123	
7-8	77	77	
9-12	88	87	
Total	613	609	224
Growth	6.2%	99.4%	36.5%

2026-27	Enrollment	ADA	UPP
TK-3	355	352	
4-6	136	135	
7-8	84	83	
9-12	96	95	
Total	671	666	245
Growth	9.7%	99.2%	36.5%

2027-28	Enrollment	ADA	UPP
TK-3	386	383	
4-6	148	147	
7-8	91	90	
9-12	104	103	
Total	729	723	266
Growth	8.6%	99.2%	36.5%



2025-26 JULY vs EA - Summary

Sage Oak Charter School - South

	2025-26 July	2024-25 EA	\$ Change	% Change
Revenue				
Total LCFF Revenues	7,631,662	6,884,532	747,130	10.9 %
Total Federal Revenue	173,427	144,837	28,590	19.7 %
Total Other State Revenue	1,302,889	1,001,446	301,443	30.1 %
Total Local Revenue	77,487	77,487	0	0.0 %
Total Revenue	9,185,465	8,108,302	1,077,163	13.3 %
Expenditures				
Total 1000-1999 Certificated Salaries	3,803,589	3,315,386	488,203	14.7 %
Total 2000-2999 Classified Salaries	969,879	804,140	165,739	20.6 %
Total 3100-3999 Employee Benefits	1,738,213	1,333,383	404,830	30.4 %
Total 4100-4799 Books, Materials, & Supplies	633,761	1,110,041	(476,280)	(42.9) %
Total 5100-5999 Services & Other Operating Expenditures	1,961,010	1,513,566	447,444	29.6 %
Total 6100-6999 Capital Outlay	20,299	19,936	363	1.8 %
Total Expenditures	9,126,751	8,096,452	1,030,299	12.7 %
Operating Income/(Loss)	58,714	11,850	46,864	395.5 %
Net Assets				
9791 - Beginning Fund Balance	3,932,599	3,840,326	92,273	2.4 %
9793 - Audit Adjustments	0	80,423	(80,423)	(100.0) %
Total Net Assets	3,932,599	3,920,749	11,850	0.3 %
Change In Net Assets	58,714	11,850	46,864	395.5 %
Total Net Assets	3,991,313	3,932,599	58,714	1.5 %

Net revenue as a % of expense	0.6%	0.1%
Fund balance as a % of expense	43.7%	48.6%
Days of Potential Cash	160	177



2025-26 JULY vs EA - Detail

Sage Oak Charter School - South

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	7,026,553	6,437,560	588,993	9.1 %	
8012 - EPA Entitlement	121,864	114,594	7,270	6.3 %	
8096 - In-Lieu-Of Property Taxes	483,245	332,378	150,867	45.4 %	
Total LCFF Revenues	7,631,662	6,884,532	747,130	10.9 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	90,155	58,905	31,250	53.1 %	
8182 - SpEd - Discretionary Grants	14,920	14,920	0	0.0 %	
8290 - Other Federal Revenue	68,352	71,012	(2,660)	(3.7) %	
Total Federal Revenue	173,427	144,837	28,590	19.7 %	The change is due to enrollment and ADA.
Other State Revenue					
8311 - AB602 State SpEd Revenue	559,070	519,735	39,335	7.6 %	
8550 - Mandated Cost Reimbursements	14,780	11,622	3,158	27.2 %	
8560 - Lottery- Unrestricted	121,555	114,303	7,252	6.3 %	
8561 - Lottery- Prop 20 - Restricted	52,186	49,072	3,114	6.3 %	
8590 - Other State Revenue	555,298	306,714	248,584	81.0 %	
Total Other State Revenue	1,302,889	1,001,446	301,443	30.1 %	The change is due to the Arts, Music, and Instructional Materials (AMIM) grant being recognized.
Local Revenue					
8660 - Interest Income	77,487	77,487	0	0.0 %	
Total Local Revenue	77,487	77,487	0	0.0 %	
Total Revenue	9,185,465	8,108,302	1,077,163	13.3 %	
Expenditures					
1000-1999 Certificated Salaries					
1001 Cert. Off Schedule Pay	0	217,781	(217,781)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
1100 Certificated Teachers Salaries	2,377,513	2,127,774	249,739	11.7 %	
1200 Certificated Pupil Support	916,894	624,399	292,495	46.8 %	
1300 Certificated Supervisors and Administrators Salaries	509,182	345,432	163,750	47.4 %	
Total 1000-1999 Certificated Salaries	3,803,589	3,315,386	488,203	14.7 %	The change is related to staffing needs aligned with student enrollment and the cost-of-living adjustment (COLA) in 2025-26.
2000-2999 Classified Salaries					
2001 Class. Off Schedule Pay	0	49,739	(49,739)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
2100 Classified Instructional Salaries	152,243	80,676	71,567	88.7 %	
2300 Classified Supervisors and Admin Salaries	420,367	351,976	68,391	19.4 %	
2400 Clerical, Technical and Office Salaries	397,269	321,749	75,520	23.5 %	
Total 2000-2999 Classified Salaries	969,879	804,140	165,739	20.6 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3000-3999 Employee Benefits					
3001-3002 Employee Off Schedule Benefit					
3001 - Certificated Off Schedule Pay Benefits	0	3,738	(3,738)	(100.0) %	
3002 - Classified Off Schedule Pay Benefits	0	3,979	(3,979)	(100.0) %	
Total 3001-3002 Employee Off Schedule Benefit	0	7,717	(7,717)	(100.0) %	The change is due to the one-time off-schedule pay in 2024-25.
3101-3102 STRS					
3101 - STRS Certificated	724,061	568,183	155,878	27.4 %	
Total 3101-3102 STRS	724,061	568,183	155,878	27.4 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.



2025-26 JULY vs EA - Detail

Sage Oak Charter School - South

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	56,724	44,414	12,310	27.7 %	
3314 - Medicare - Classified	14,322	10,774	3,548	32.9 %	
3355 - OASDI - Certificated	893	1,527	(634)	(41.5) %	
3356 - OASDI - Classified	61,239	46,081	15,158	32.9 %	
Total 3301-3302 OASDI/Medicare/Alternative	133,178	102,796	30,382	29.6 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	429,864	361,761	68,103	18.8 %	
3402 - Health Care Classified	164,859	107,422	57,437	53.5 %	
Total 3401-3402 Health and Welfare Benefits	594,723	469,183	125,540	26.8 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	9,969	10,736	(767)	(7.1) %	
3502 - Unemployment Insurance Classified	4,669	4,367	302	6.9 %	
Total 3501-3502 Unemployment Insurance	14,638	15,103	(465)	(3.1) %	The change is related to staffing needs aligned with student enrollment.
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	13,685	10,723	2,962	27.6 %	
3602 - Workers' Comp Classified	3,456	2,595	861	33.2 %	
Total 3601-3602 Workers' Compensation	17,141	13,318	3,823	28.7 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
3901-3922 Other Employee Benefits					
3901 - Other Benefits Cert	133,114	99,002	34,112	34.5 %	
3902 - Other Benefits Class	26,967	14,608	12,359	84.6 %	
3922 - 457b Employer match-Classified	94,391	43,473	50,918	117.1 %	
Total 3901-3922 Other Employee Benefits	254,472	157,083	97,389	62.0 %	The change is related to staffing needs aligned with student enrollment and the COLA in 2025-26.
Total 3000-3999 Employee Benefits	1,738,213	1,333,383	404,830	30.4 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	74,488	337,750	(263,262)	(77.9) %	
Total 4200 Books and Other Reference Materials	74,488	337,750	(263,262)	(77.9) %	The change is due to the purchase of additional curriculum for Oak School students, which was completed in the 2024-25 fiscal year.
4300 Materials and Supplies					
4310 - Materials & Supplies	70,437	46,794	23,643	50.5 %	The change is due to additional materials and supplies aligned with student enrollment.
4320 - Office Supplies	19,332	25,071	(5,739)	(22.9) %	The change is due to a one-time purchase of supplies for the Career and Technical Education (CTE) pathway program.
4330 - Events	8,160	1,574	6,586	418.4 %	The change is due to object code alignment for student-related art activities and events.
4350 - Other Supplies - Materials & Supplies	2,071	1,403	668	47.6 %	The change is due to materials and supplies needed for student graduation.
4381 - Instructional Funds - Materials	390,492	542,390	(151,898)	(28.0) %	The change is due to a shift in instructional funds from materials to services.
Total 4300 Materials and Supplies	490,492	617,232	(126,740)	(20.5) %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	68,781	155,059	(86,278)	(55.6) %	The change is due to one-time purchases of new devices for staff and students.
Total 4400 Noncapitalized Equipment	68,781	155,059	(86,278)	(55.6) %	
Total 4100-4799 Books, Materials, & Supplies	633,761	1,110,041	(476,280)	(42.9) %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School - South

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	21,997	48,446	(26,449)	(54.6) %	
Total 5100 Subagreements for Services	21,997	48,446	(26,449)	(54.6) %	The change is due to employee recruitment rather than utilizing external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	3,337	383	2,954	771.3 %	The change is due to coding alignment for employee reimbursements.
5220 - Travel & Lodging	30,450	35,919	(5,469)	(15.2) %	The change is due to staff attendance at professional development conferences.
5225 - Travel & Conferences	15,347	15,161	186	1.2 %	
Total 5200 Travel and Conferences	49,134	51,463	(2,329)	(4.5) %	
5300 Dues and Memberships					
5300 - Dues & Memberships	19,810	18,751	1,059	5.6 %	
Total 5300 Dues and Memberships	19,810	18,751	1,059	5.6 %	The change is due to updated membership fees associated with professional organizations.
5400 Insurance					
5400 - Insurance	19,122	23,456	(4,334)	(18.5) %	
Total 5400 Insurance	19,122	23,456	(4,334)	(18.5) %	The change is due to a cyber liability insurance policy.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	17,442	6,331	11,111	175.5 %	
Total 5500 Operations and Housekeeping Services	17,442	6,331	11,111	175.5 %	The change is due to coding alignment for student Wi-Fi services.
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	91,070	59,760	31,310	52.4 %	The change is due to the lease of additional office and warehouse space.
5612 - Testing Site	16,033	9,087	6,946	76.4 %	The change is due to rental of assessment locations for Special Education students.
5620 - Equipment Leases	687	650	37	5.7 %	The change is due to the operating lease for the printer.
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	107,790	69,497	38,293	55.1 %	
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	32,401	18,285	14,116	77.2 %	The change is due to adjustments in marketing consultant services related to data systems.
5810 - Legal	34,348	32,513	1,835	5.6 %	The change is due to the retention of legal counsel.
5820 - Audit & CPA	7,354	7,078	276	3.9 %	The change is due to the updated contract for audit services.
5835 - Field Trips	16,634	11,002	5,632	51.2 %	The change is due to additional student field trips.
5840 - Advertising & Recruitment	10,596	14,775	(4,179)	(28.3) %	The change is due to advertising expenses for marketing efforts and recruitment.
5850 - Oversight Fees	76,339	68,820	7,519	10.9 %	The change is due to additional enrollment, which increases revenue and thereby oversight fees.
5860 - Service Fees	55,492	58,039	(2,547)	(4.4) %	The change is due to updated allocation percentages per location.
5863 - Professional Development	110,814	36,179	74,635	206.3 %	The change is due to utilization of the AMIM Grant for teachers and staff professional development
5870 - Livescan Fingerprinting	801	169	632	374.0 %	The change is due to the purchase and associated maintenance fee for the LiveScan printer.
5877 - Lending Library	112,493	1,492	111,001	7,439.7 %	The change is due to additional curriculum purchases for the Lending Library.
5878 - Student Assessment	4,872	4,300	572	13.3 %	The change is due to the updated quote for the i-Ready assessment.
5880 - Instructional Vendors & Consultants	11,186	10,200	986	9.7 %	
5881 - Instructional Funds - Services	911,149	813,586	97,563	12.0 %	The change is due to a shift in instructional funds from materials to services.
5883 - Outside Consultant and Services	5,115	12,240	(7,125)	(58.2) %	The change is due to contracting an outside consultant for job descriptions update.
5887 - Student Service Technology	93,486	96,168	(2,682)	(2.8) %	
Total 5800 Professional/Consulting Services and Operating Expend.	1,483,080	1,184,846	298,234	25.2 %	



2025-26 JULY vs EA - Detail

Sage Oak Charter School - South

	2025-26 July	2024-25 EA	\$ Change	% Change	Notes
5900 Communications					
5930 - Postage	17,368	13,817	3,551	25.7 %	The change is due to warehouse shipping expenses. The change is due to the number of staff and student users accessing technology applications.
5940 - Technology Services	225,267	96,959	128,308	132.3 %	
Total 5900 Communications	242,635	110,776	131,859	119.0 %	
Total 5100-5999 Services & Other Operating Expenditures	1,961,010	1,513,566	447,444	29.6 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	20,299	19,936	363	1.8 %	
Total Capital Expenditures	20,299	19,936	363	1.8 %	
Total 6100-6999 Capital Outlay	20,299	19,936	363	1.8 %	
Total Expenditures	9,126,751	8,096,452	1,030,299	12.7 %	
Operating Income/(Loss)	58,714	11,850	46,864	395.5 %	
Net Assets					
9791 - Beginning Fund Balance	3,932,599	3,840,326	92,273	2.4 %	
9793 - Audit Adjustments	0	80,423	(80,423)	(100.0) %	
Total Net Assets	3,932,599	3,920,749	11,850	0.3 %	
Change In Net Assets	58,714	11,850	46,864	395.5 %	
Total Net Assets	3,991,313	3,932,599	58,714	1.5 %	
Net revenue as a % of expense	0.6%	0.1%			
Fund balance as a % of expense	43.7%	48.6%			
Days of Potential Cash	160	177			



2025-26 JULY vs EA - MYP Summary

Sage Oak Charter School - South

Enrollment	613	671	729
ADA	609	666	723
COLA	2.30 %	3.52 %	3.63 %

	2025-26 July	2026-27	2027-28
Revenue			
Total LCFF Revenues	7,631,662	8,627,202	9,713,347
Total Federal Revenue	173,427	181,874	191,051
Total Other State Revenue	1,302,889	980,644	1,090,057
Total Local Revenue	77,487	77,487	77,487
Total Revenue	9,185,465	9,867,207	11,071,942
Expenditures			
Total 1000-1999 Certificated Salaries	3,803,589	4,183,949	4,768,030
Total 2000-2999 Classified Salaries	969,879	1,066,866	1,184,222
Total 3100-3999 Employee Benefits	1,738,213	1,859,029	2,026,936
Total 4100-4799 Books, Materials, & Supplies	633,761	694,207	734,953
Total 5100-5999 Services & Other Operating Expenditures	1,961,010	1,860,795	1,956,861
Total 6100-6999 Capital Outlay	20,299	24,075	24,708
Total Expenditures	9,126,751	9,688,921	10,695,710
Operating Income/(Loss)	58,714	178,286	376,232
Net Assets			
9791 - Beginning Fund Balance	3,932,599	3,991,313	4,169,599
Total Net Assets	3,932,599	3,991,313	4,169,599
Change In Net Assets	58,714	178,286	376,232
Total Net Assets	3,991,313	4,169,599	4,545,831
Net revenue as a % of expense	0.6%	1.8%	3.5%
Fund balance as a % of expense	43.7%	43.0%	42.5%
Days of Potential Cash	160	157	155



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2025-26 July	2026-27	2027-28
Revenue			
LCFF Revenue			
8011 - LCFF General Entitlement	7,026,553	7,945,931	8,972,496
8012 - EPA Entitlement	121,864	133,126	144,634
8096 - In-Lieu-Of Property Taxes	483,245	548,145	596,217
Total LCFF Revenues	7,631,662	8,627,202	9,713,347
Federal Revenue			
8181 - Federal IDEA SpEd Revenue	90,155	99,302	108,479
8182 - SpEd - Discretionary Grants	14,920	14,920	14,920
8290 - Other Federal Revenue	68,352	67,652	67,652
Total Federal Revenue	173,427	181,874	191,051
Other State Revenue			
8311 - AB602 State SpEd Revenue	559,070	632,234	711,817
8550 - Mandated Cost Reimbursements	14,780	16,282	18,408
8560 - Lottery- Unrestricted	121,555	132,788	144,266
8561 - Lottery- Prop 20 - Restricted	52,186	57,009	61,936
8590 - Other State Revenue	555,298	142,331	153,630
Total Other State Revenue	1,302,889	980,644	1,090,057
Local Revenue			
8660 - Interest Income	77,487	77,487	77,487
Total Local Revenue	77,487	77,487	77,487
Total Revenue	9,185,465	9,867,207	11,071,942
Expenditures			
1000-1999 Certificated Salaries			
1100 Certificated Teachers Salaries	2,377,513	2,615,266	3,026,792
1200 Certificated Pupil Support	916,894	1,008,583	1,119,527
1300 Certificated Supervisors and Administrators Salaries	509,182	560,100	621,711
Total 1000-1999 Certificated Salaries	3,803,589	4,183,949	4,768,030
2000-2999 Classified Salaries			
2001 Class. Off Schedule Pay			
2100 Classified Instructional Salaries	152,243	167,465	185,886
2300 Classified Supervisors and Admin Salaries	420,367	462,405	513,270
2400 Clerical, Technical and Office Salaries	397,269	436,996	485,066
Total 2000-2999 Classified Salaries	969,879	1,066,866	1,184,222



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2025-26 July	2026-27	2027-28
3100-3999 Employee Benefits			
3101-3102 STRS			
3101 - STRS Certificated	724,061	799,134	882,043
Total 3101-3102 STRS	724,061	799,134	882,043
3301-3302 OASDI/Medicare/Alternative			
3313 - Medicare - Certificated	56,724	62,261	68,648
3314 - Medicare - Classified	14,322	15,738	17,470
3355 - OASDI - Certificated	893	951	1,056
3356 - OASDI - Classified	61,239	65,220	72,394
Total 3301-3302 OASDI/Medicare/Alternative	133,178	144,170	159,568
3401-3402 Health and Welfare Benefits			
3401 - Health Care Certificated	429,864	444,910	470,616
3402 - Health Care Classified	164,859	170,630	189,399
Total 3401-3402 Health and Welfare Benefits	594,723	615,540	660,015
3501-3502 Unemployment Insurance			
3501 - Unemployment Insurance Certificated	9,968	10,316	10,929
3502 - Unemployment Insurance Classified	4,669	4,832	5,364
Total 3501-3502 Unemployment Insurance	14,637	15,148	16,293
3601-3602 Workers' Compensation			
3601 - Workers' Comp Certificated	13,684	15,029	16,570
3602 - Workers' Comp Classified	3,457	3,799	4,217
Total 3601-3602 Workers' Compensation	17,141	18,828	20,787
3901-3922 Other Employee Benefits			
3901 - Other Benefits Cert	133,114	137,772	145,666
3902 - Other Benefits Class	26,967	27,910	30,979
3922 - 457b Employer match-Classified	94,392	100,527	111,585
Total 3901-3922 Other Employee Benefits	254,473	266,209	288,230
Total 3100-3999 Employee Benefits	1,738,213	1,859,029	2,026,936



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2025-26 July	2026-27	2027-28
4100-4799 Books, Materials, & Supplies			
4200 Books and Other Reference Materials			
4200 - Other Reference Materials	74,488	83,806	94,314
Total 4200 Books and Other Reference Materials	74,488	83,806	94,314
4300 Materials and Supplies			
4310 - Materials & Supplies	70,437	87,544	98,882
4320 - Office Supplies	19,332	16,869	18,331
4330 - Meals & Events	8,160	9,257	9,750
4350 - Other Supplies - Materials & Supplies	2,071	1,827	2,125
4381 - Instructional Funds - Materials	390,492	428,030	439,276
Total 4300 Materials and Supplies	490,492	543,527	568,364
4400 Noncapitalized Equipment			
4400 - Non-Capitalized Equipment	68,781	66,874	72,275
Total 4400 Noncapitalized Equipment	68,781	66,874	72,275
Total 4100-4799 Books, Materials, & Supplies	633,761	694,207	734,953
5100-5999 Services & Other Operating Expenditures			
5100 Subagreements for Services			
5100 - SpEd Consultants and Vendors Subagreements for Service	21,997	24,543	27,888
Total 5100 Subagreements for Services	21,997	24,543	27,888
5200 Travel and Conferences			
5210 - Mileage Reimbursements	3,337	2,948	3,050
5220 - Travel & Lodging	30,450	31,973	35,688
5225 - Travel & Conferences Meals	15,347	15,316	15,788
Total 5200 Travel and Conferences	49,134	50,237	54,526
5300 Dues and Memberships			
5300 - Dues & Memberships	19,810	21,783	23,668
Total 5300 Dues and Memberships	19,810	21,783	23,668
5400 Insurance			
5400 - Insurance	19,122	22,350	22,938
Total 5400 Insurance	19,122	22,350	22,938
5500 Operations and Housekeeping Services			
5510 - Utilities (General)	17,442	17,442	17,602
Total 5500 Operations and Housekeeping Services	17,442	17,442	17,602



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2025-26 July	2026-27	2027-28
5600 Rents, Leases, Repairs, and Noncap. Improvements			
5610 - Facility Rents & Leases	91,070	93,262	96,413
5612 - Testing Site	16,033	10,219	11,588
5620 - Equipment Leases	687	755	838
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	107,790	104,236	108,839
5800 Professional/Consulting Services and Operating Expend.			
5800 - Professional Services - Non-instructional	32,401	27,856	28,963
5810 - Legal	34,348	37,648	42,025
5820 - Audit & CPA	7,354	6,699	6,875
5835 - Field Trips	16,634	20,188	22,575
5840 - Advertising & Recruitment	10,596	9,638	10,404
5850 - Oversight Fees	76,339	86,272	97,133
5860 - Service Fees	55,492	60,827	68,213
5863 - Professional Development	110,814	115,247	119,525
5870 - Livescan Fingerprinting	801	378	388
5877 - Lending Library	112,493	853	875
5878 - Student Assessment	4,872	6,102	6,813
5880 - Instructional Vendors & Consultants	11,186	0	0
5881 - Instructional Funds - Services	911,149	998,737	1,024,977
5883 - Outside Consultant and Services	5,115	1,790	1,925
5887 - Student Service Technology	93,486	98,882	109,254
Total 5800 Professional/Consulting Services and Operating Expend.	1,483,080	1,471,117	1,539,945
5900 Communications			
5930 - Postage	17,368	17,612	18,100
5940 - Technology Services	225,267	131,475	143,355
Total 5900 Communications	242,635	149,087	161,455
Total 5100-5999 Services & Other Operating Expenditures	1,961,010	1,860,795	1,956,861



2025-26 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2025-26 July	2026-27	2027-28
6100-6999 Capital Outlay			
Capital Expenditures			
6901 - Depreciation Expense-Leasehold Improvements	20,299	24,075	24,708
Total Capital Expenditures	20,299	24,075	24,708
Total 6100-6999 Capital Outlay	20,299	24,075	24,708
Total Expenditures	9,126,751	9,688,921	10,695,710
Operating Income/(Loss)	58,714	178,286	376,232
Net Assets			
9791 - Beginning Fund Balance	3,932,599	3,991,313	4,169,599
Total Net Assets	3,932,599	3,991,313	4,169,599
Change In Net Assets	58,714	178,286	376,232
Total Net Assets	3,991,313	4,169,599	4,545,831
Net revenue as a % of expense	0.6%	1.8%	3.5%
Fund balance as a % of expense	43.7%	43.0%	42.5%
Days of Potential Cash	160	157	155



2025-26 JULY vs EA

Cash Flow Statement 2025-26

Sage Oak Charter School - South

	Year Ending 06/30/2026	2025-26 July	Month Ending 07/31/2025		Month Ending 08/31/2025		Month Ending 09/30/2025		Month Ending 10/31/2025		Month Ending 11/30/2025		Month Ending 12/31/2025		Month Ending 01/31/2026		Month Ending 02/28/2026		Month Ending 03/31/2026		Month Ending 04/30/2026		Month Ending 05/31/2026		Month Ending 06/30/2026		Accrued
			Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	Projection	Month Ending	
Cash Balance																											
Beginning Cash	3,932,599	3,932,599	4,058,304	3,910,399	4,069,213	4,033,090	4,023,748	4,077,339	4,215,900	4,133,142	4,320,165	4,350,387	4,469,689														
Net Cash for Period																											
REVENUES	9,185,465	436,458	476,235	845,799	741,264	740,979	793,776	849,260	731,211	928,275	759,952	810,384	1,020,872	51,000													
EXPENDITURES	9,126,751	308,938	624,139	686,985	777,387	750,321	740,184	710,699	813,969	741,252	729,730	691,083	1,362,423	189,640													
Net Cash for Period	58,714	127,520	(147,904)	158,814	(36,123)	(9,342)	53,592	138,561	(82,758)	187,023	30,222	119,301	(341,551)	(138,640)													
Accounts Receivable	1,749,498	1,749,498																									
Accounts Payable	1,205,281	1,205,281																									
Debt Proceeds																											
Deferred Revenue/Prepaid Expenses	544,217	542,402																									
Cash at End of Period	3,991,313	4,058,304	3,910,399	4,069,213	4,033,090	4,023,748	4,077,339	4,215,900	4,133,142	4,320,165	4,350,387	4,469,689	3,495,751	1,815													
Days Cash on Hand	160	162	156	163	161	161	163	169	165	173	174	179	140	0													

2025-26 JULY vs EA

Cash Flow Statement 2026-27

Sage Oak Charter School - South

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027
		Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Accrued
Cash Balance													
Beginning Cash	3,495,751	3,495,751	3,076,162	2,818,728	2,793,083	2,926,355	2,979,298	3,099,899	3,211,492	3,149,180	3,203,301	3,127,175	3,051,049
Net Cash for Period													
REVENUES	9,867,207	551,577	537,763	927,517	995,601	838,713	873,248	838,713	838,713	955,146	824,899	824,899	860,418
EXPENDITURES	9,688,921	300,795	795,197	953,162	862,329	785,770	752,647	727,120	901,025	901,025	901,025	901,025	907,801
Net Cash for Period	178,286	250,782	(257,434)	(25,645)	133,272	52,943	120,601	111,593	(62,312)	54,121	(76,126)	(76,126)	(47,383)
Accounts Receivable	(1,033,005)	(1,033,005)											
Accounts Payable	(364,449)	(364,449)											
Deferred Revenue/Prepaid Expenses	1,815	1,815											
Cash at End of Period	3,003,666	3,076,162	2,818,728	2,793,083	2,926,355	2,979,298	3,099,899	3,211,492	3,149,180	3,203,301	3,127,175	3,051,049	3,003,666
Days Cash on Hand	113	116	106	105	110	112	117	121	119	121	118	115	113

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - South
CDS #: 37754160139378 2051 - South
Charter Approving Entity: Warner Unified School District
County: San Diego
Charter #: 2051

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below; check only one box)

- ☒ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)
☐ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	7,026,553.00		7,026,553.00
Education Protection Account State Aid - Current Year	8012	121,864.00		121,864.00
State Aid - Prior Years	8019	0.00		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	483,245.00		483,245.00
Other LCFF Transfers	8091, 8097	0.00	0.00	0.00
Total, LCFF Sources		7,631,662.00	0.00	7,631,662.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		68,352.00	68,352.00
Special Education - Federal	8181, 8182		105,075.00	105,075.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	0.00	0.00
Total, Federal Revenues		0.00	173,427.00	173,427.00
3. Other State Revenues				
Special Education - State	StateRevSE		559,070.00	559,070.00
All Other State Revenues	StateRevAO	136,335.00	607,484.00	743,819.00
Total, Other State Revenues		136,335.00	1,166,554.00	1,302,889.00
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	77,487.00	0.00	77,487.00
Total, Local Revenues		77,487.00	0.00	77,487.00
5. TOTAL REVENUES		7,845,484.00	1,339,981.00	9,185,465.00
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	2,138,214.00	239,299.00	2,377,513.00
Certificated Pupil Support Salaries	1200	414,423.00	502,471.00	916,894.00
Certificated Supervisors' and Administrators' Salaries	1300	429,716.00	79,466.00	509,182.00
Other Certificated Salaries	1900	0.00	0.00	0.00
Total, Certificated Salaries		2,982,353.00	821,236.00	3,803,589.00
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	47,208.00	105,034.00	152,242.00
Noncertificated Support Salaries	2200	0.00	0.00	0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	397,311.00	23,057.00	420,368.00
Clerical, Technical and Office Salaries	2400	380,255.00	17,014.00	397,269.00
Other Noncertificated Salaries	2900	0.00	0.00	0.00
Total, Noncertificated Salaries		824,774.00	145,105.00	969,879.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378 2051 - South

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	566,800.00	157,261.00	724,061.00
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	109,473.00	23,705.00	133,178.00
Health and Welfare Benefits	3401-3402	459,910.00	134,813.00	594,723.00
Unemployment Insurance	3501-3502	11,093.00	3,545.00	14,638.00
Workers' Compensation Insurance	3601-3602	13,661.00	3,480.00	17,141.00
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	205,422.00	49,050.00	254,472.00
Total, Employee Benefits		1,366,359.00	371,854.00	1,738,213.00
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	0.00	0.00	0.00
Books and Other Reference Materials	4200	70,770.00	3,718.00	74,488.00
Materials and Supplies	4300	436,133.00	54,359.00	490,492.00
Noncapitalized Equipment	4400	68,781.00	0.00	68,781.00
Food	4700	0.00	0.00	0.00
Total, Books and Supplies		575,684.00	58,077.00	633,761.00
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	0.00	21,997.00	21,997.00
Travel and Conferences	5200	49,134.00	0.00	49,134.00
Dues and Memberships	5300	19,809.00	0.00	19,809.00
Insurance	5400	19,123.00	0.00	19,123.00
Operations and Housekeeping Services	5500	17,442.00	0.00	17,442.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	91,927.00	15,862.00	107,789.00
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	1,219,117.00	263,964.00	1,483,081.00
Communications	5900	215,322.00	27,313.00	242,635.00
Total, Services and Other Operating Expenditures		1,631,874.00	329,136.00	1,961,010.00
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	20,299.00	0.00	20,299.00
Amortization Expense - Lease Assets	6910	0.00	0.00	0.00
Total, Capital Outlay		20,299.00	0.00	20,299.00
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	0.00	0.00	0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		7,401,343.00	1,725,408.00	9,126,751.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378 2051 - South

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		444,141.00	(385,427.00)	58,714.00
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00
2. Less: Other Uses	7630-7699	0.00	0.00	0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(385,427.00)	385,427.00	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(385,427.00)	385,427.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		58,714.00	0.00	58,714.00
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	3,932,599.00	0.00	3,932,599.00
b. Adjustments/Restatements	9793, 9795	0.00	0.00	0.00
c. Adjusted Beginning Fund Balance /Net Position		3,932,599.00	0.00	3,932,599.00
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		3,991,313.00	0.00	3,991,313.00
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	0.00	0.00	0.00
b. Restricted Net Position	9797		0.00	0.00
c. Unrestricted Net Position	9790A	3,991,313.00	0.00	3,991,313.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378 2051 - South

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110	0.00	0.00	0.00
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00
In Banks	9120	3,409,058	582,255.00	3,991,313.00
In Revolving Fund	9130	0.00	0.00	0.00
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00
Collections Awaiting Deposit	9140	0.00	0.00	0.00
2. Investments	9150	0.00	0.00	0.00
3. Accounts Receivable	9200	1,073,212.00	555,937.00	1,629,149.00
4. Due from Grantor Governments	9290	0.00	0.00	0.00
5. Stores	9320	0.00	0.00	0.00
6. Prepaid Expenditures (Expenses)	9330	27,419.00	4,683.00	32,102.00
7. Other Current Assets	9340	0.00	0.00	0.00
8. Lease Receivable	9380	0.00	0.00	0.00
9. Capital Assets (accrual basis only)	9400-9489	88,247	0.00	88,247.00
10. TOTAL ASSETS		4,597,936.00	1,142,875.00	5,740,811.00
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	518,659.00	598,658.00	1,117,317.00
2. Due to Grantor Governments	9590	0.00	0.00	0.00
3. Current Loans	9640	0.00	0.00	0.00
4. Unearned Revenue	9650	0.00	544,217.00	544,217.00
5. Long-Term Liabilities (accrual basis only)	9660-9669	87,964.00	0.00	87,964.00
6. TOTAL LIABILITIES		606,623.00	1,142,875.00	1,749,498.00
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690	0.00	0.00	0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		3,991,313.00	0.00	3,991,313.00

**CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026**

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378 2051 - South

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. None	\$ 0.00	0.00	0.00
b.			0.00
c.			0.00
d.			0.00
e.			0.00
f.			0.00
g.			0.00
h.			0.00
i.			0.00
j.			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries 1000-1999	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits except 3801-	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Brief Description i.e., COVID-19 (If no amounts, indicate "None")	Amount
a. None	0.00
b.	
c.	
d.	
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)	0.00

**CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2025 to June 30, 2026**

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378 2051 - South

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2024-25 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2025-26.

a. Total Expenditures (B8)	9,126,751.00
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	173,427.00
c. Subtotal of State & Local Expenditures [a minus b]	8,953,324.00
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	20,299.00
f. Less Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster	0.00
TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e minus f]	\$ 8,933,025.00

EDUCATION PROTECTION ACCOUNT - SPENDING DETERMINATION

State law requires that our charter school make a specific determination of how Education Protection Account monies are received and spent. These funds may not be expended on administrative costs. Our practice is to expend 100% of all Education Protection Account monies on teacher salaries, to ensure that 100% of spending is instructionally-related and is not spent for administrative uses.

The table on the following page shows the historical and projected revenues and expenditures of Education Protection Account dollars, from the most recent audited fiscal year through the upcoming budget year.

This document shall be approved by the School's Governing Board as part of the approval of the annual budget in June, and a copy of the approved document shall be posted on the School's website.

Below is the actual law relating to this requirement:

Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution:

(6) A community college district, county office of education, school district, or charter school shall have sole authority to determine how the moneys received from the Education Protection Account are spent in the school or schools within its jurisdiction, provided, however, that the appropriate governing board or body shall make these spending determinations in open session of a public meeting of the governing board or body and shall not use any of the funds from the Education Protection Account for salaries or benefits of administrators or any other administrative costs. Each community college district, county office of education, school district, and charter school shall annually publish on its Internet Web site an accounting of how much money was received from the Education Protection Account and how that money was spent.

EDUCATION PROTECTION ACCOUNT - EXPENDITURE SUMMARY		
Sage Oak Charter School		
Budgeted Expenditures through: June 30, 2026		
Resource 1400 Education Protection Account		
Description	Object Codes	Amount
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Adjusted Beginning Fund Balance	9791-9795	\$0
Education Protection Account Revenue	8010-8099	\$819,454
Federal Revenue	8100-8299	\$0
Other State Revenue	8300-8599	\$0
Other Local Revenue	8600-8799	\$0
All Other Financing Sources and Contributions	8900-8999	\$0
Deferred Revenue	9650	\$0
TOTAL AVAILABLE		\$819,454
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)		
Instruction	1000-1999	\$819,454
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	\$0
AU of a Multidistrict SELPA	2200	\$0
Instructional Library, Media, and Technology	2420	\$0
Other Instructional Resources	2490-2495	\$0
School Administration	2700	\$0
Pupil Services		
Guidance and Counseling Services	3110	\$0
Psychological Services	3120	\$0
Attendance and Social Work Services	3130	\$0
Health Services	3140	\$0

Speech Pathology and Audiology Services	3150	\$0
Pupil Testing Services	3160	\$0
Pupil Transportation	3600	\$0
Food Services	3700	\$0
Other Pupil Services	3900	\$0
Ancillary Services	4000-4999	\$0
Community Services	5000-5999	\$0
Enterprise	6000-6999	\$0
General Administration	7000-7999	\$0
Plant Services	8000-8999	\$0
Other Outgo	9000-9999	\$0
TOTAL EXPENDITURES AND OTHER FINANCING USES		\$819,454
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		\$0
The portion of EPA revenue expended on instruction (non-administrative)		100.00%

EDUCATION PROTECTION ACCOUNT - SPENDING DETERMINATION

State law requires that our charter school make a specific determination of how Education Protection Account monies are received and spent. These funds may not be expended on administrative costs. Our practice is to expend 100% of all Education Protection Account monies on teacher salaries, to ensure that 100% of spending is instructionally-related and is not spent for administrative uses.

The table on the following page shows the historical and projected revenues and expenditures of Education Protection Account dollars, from the most recent audited fiscal year through the upcoming budget year.

This document shall be approved by the School's Governing Board as part of the approval of the annual budget in June, and a copy of the approved document shall be posted on the School's website.

Below is the actual law relating to this requirement:

Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution:

(6) A community college district, county office of education, school district, or charter school shall have sole authority to determine how the moneys received from the Education Protection Account are spent in the school or schools within its jurisdiction, provided, however, that the appropriate governing board or body shall make these spending determinations in open session of a public meeting of the governing board or body and shall not use any of the funds from the Education Protection Account for salaries or benefits of administrators or any other administrative costs. Each community college district, county office of education, school district, and charter school shall annually publish on its Internet Web site an accounting of how much money was received from the Education Protection Account and how that money was spent.

EDUCATION PROTECTION ACCOUNT - EXPENDITURE SUMMARY		
Sage Oak Charter School - Keppel		
Budgeted Expenditures through: June 30, 2026		
Resource 1400 Education Protection Account		
Description	Object Codes	Amount
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Adjusted Beginning Fund Balance	9791-9795	\$0
Education Protection Account Revenue	8010-8099	\$92,442
Federal Revenue	8100-8299	\$0
Other State Revenue	8300-8599	\$0
Other Local Revenue	8600-8799	\$0
All Other Financing Sources and Contributions	8900-8999	\$0
Deferred Revenue	9650	\$0
TOTAL AVAILABLE		\$92,442
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)		
Instruction	1000-1999	\$92,442
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	\$0
AU of a Multidistrict SELPA	2200	\$0
Instructional Library, Media, and Technology	2420	\$0
Other Instructional Resources	2490-2495	\$0
School Administration	2700	\$0
Pupil Services		
Guidance and Counseling Services	3110	\$0
Psychological Services	3120	\$0
Attendance and Social Work Services	3130	\$0
Health Services	3140	\$0

Speech Pathology and Audiology Services	3150	\$0
Pupil Testing Services	3160	\$0
Pupil Transportation	3600	\$0
Food Services	3700	\$0
Other Pupil Services	3900	\$0
Ancillary Services	4000-4999	\$0
Community Services	5000-5999	\$0
Enterprise	6000-6999	\$0
General Administration	7000-7999	\$0
Plant Services	8000-8999	\$0
Other Outgo	9000-9999	\$0
TOTAL EXPENDITURES AND OTHER FINANCING USES		\$92,442
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		\$0
The portion of EPA revenue expended on instruction (non-administrative)		100.00%

EDUCATION PROTECTION ACCOUNT - SPENDING DETERMINATION

State law requires that our charter school make a specific determination of how Education Protection Account monies are received and spent. These funds may not be expended on administrative costs. Our practice is to expend 100% of all Education Protection Account monies on teacher salaries, to ensure that 100% of spending is instructionally-related and is not spent for administrative uses.

The table on the following page shows the historical and projected revenues and expenditures of Education Protection Account dollars, from the most recent audited fiscal year through the upcoming budget year.

This document shall be approved by the School's Governing Board as part of the approval of the annual budget in June, and a copy of the approved document shall be posted on the School's website.

Below is the actual law relating to this requirement:

Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution:

(6) A community college district, county office of education, school district, or charter school shall have sole authority to determine how the moneys received from the Education Protection Account are spent in the school or schools within its jurisdiction, provided, however, that the appropriate governing board or body shall make these spending determinations in open session of a public meeting of the governing board or body and shall not use any of the funds from the Education Protection Account for salaries or benefits of administrators or any other administrative costs. Each community college district, county office of education, school district, and charter school shall annually publish on its Internet Web site an accounting of how much money was received from the Education Protection Account and how that money was spent.

EDUCATION PROTECTION ACCOUNT - EXPENDITURE SUMMARY		
Sage Oak Charter School - South		
Budgeted Expenditures through: June 30, 2026		
Resource 1400 Education Protection Account		
Description	Object Codes	Amount
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Adjusted Beginning Fund Balance	9791-9795	\$0
Education Protection Account Revenue	8010-8099	\$ 121,864
Federal Revenue	8100-8299	\$0
Other State Revenue	8300-8599	\$0
Other Local Revenue	8600-8799	\$0
All Other Financing Sources and Contributions	8900-8999	\$0
Deferred Revenue	9650	\$0
TOTAL AVAILABLE		\$ 121,864
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)		
Instruction	1000-1999	\$ 121,864
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	\$0
AU of a Multidistrict SELPA	2200	\$0
Instructional Library, Media, and Technology	2420	\$0
Other Instructional Resources	2490-2495	\$0
School Administration	2700	\$0
Pupil Services		
Guidance and Counseling Services	3110	\$0
Psychological Services	3120	\$0
Attendance and Social Work Services	3130	\$0
Health Services	3140	\$0

Speech Pathology and Audiology Services	3150	\$0
Pupil Testing Services	3160	\$0
Pupil Transportation	3600	\$0
Food Services	3700	\$0
Other Pupil Services	3900	\$0
Ancillary Services	4000-4999	\$0
Community Services	5000-5999	\$0
Enterprise	6000-6999	\$0
General Administration	7000-7999	\$0
Plant Services	8000-8999	\$0
Other Outgo	9000-9999	\$0
TOTAL EXPENDITURES AND OTHER FINANCING USES		\$ 121,864
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		\$0
The portion of EPA revenue expended on instruction (non-administrative)		100.00%